



# Pathways to Prosperity: New Hanover County's Plan for Jobs and Investment



**Presented to the Board of County  
Commissioners and the Wilmington City Council**

**2 April 2014**

**Garner** | **Economics LLC**  
solutions that work



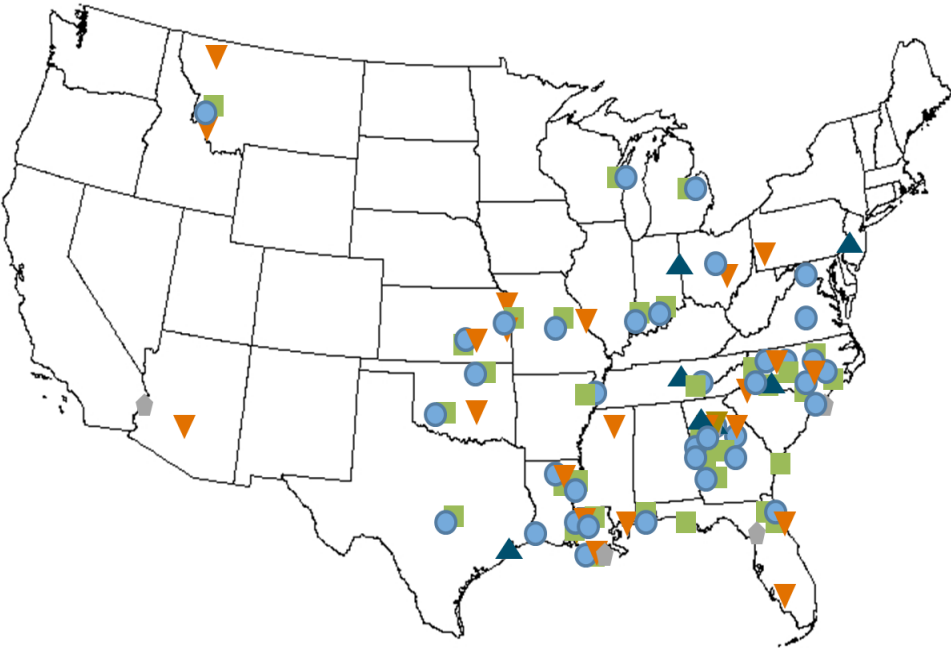


## Who We Are

Garner Economics provides **creative, strategic** and **executable value** to companies, communities and organizations globally.

We are specialists as corporate site location advisors and economic development strategists.

# Some Clients



- Strategic Planning/Business Targeting
- ▲ Site Selection
- Workforce Assessment
- ◆ Research/Economic Analysis
- ▼ Organizational Analysis



**Austin Chamber**



**JACKSONVILLE**  
Chamber of Commerce



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**GREATER PHOENIX ECONOMIC COUNCIL**



**ECONOMIC DEVELOPMENT COALITION OF SOUTHWEST INDIANA**



**Covington**  
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**bartlesville**  
IT'S TIME FOR BUSINESS.



**Hatfield**  
CRAFTED WITH PRIDE



**Lynchburg Virginia**



**Hill's**



**MISSOULA**  
SALMON RIVER VALLEY



**LED** LOUISIANA  
ECONOMIC DEVELOPMENT



**Baton Rouge Area Chamber**



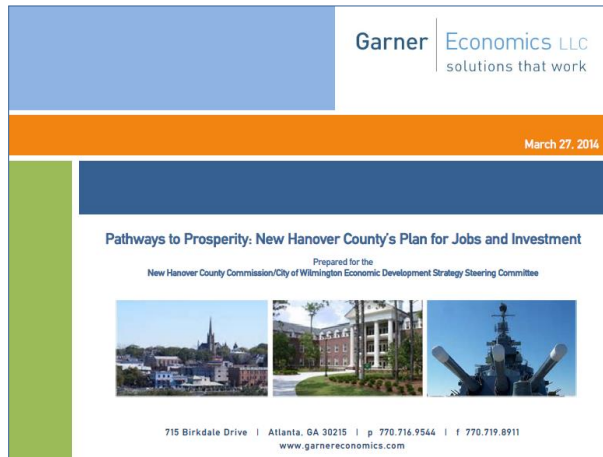
**Academy**  
SPORTS+OUTDOORS



**LOWE'S**  
Let's Build Something Together



**FPi**  
FUTURE PIPE INDUSTRIES  
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# Developing Pathways to Prosperity

## Project Goal, Scope and Methodology

# Project Process

Discovery → Targeting → Recommendations

- Assets and Challenges assessment of the area
- Competitive analysis of New Hanover County; US; NC; Greenville County, SC; and Mobile County, AL
- Stakeholder input on the business climate of the county
- Published the *Competitive Realities Report*

1

- Labor Analysis
- Industry Specialization
- Cluster Analysis

2

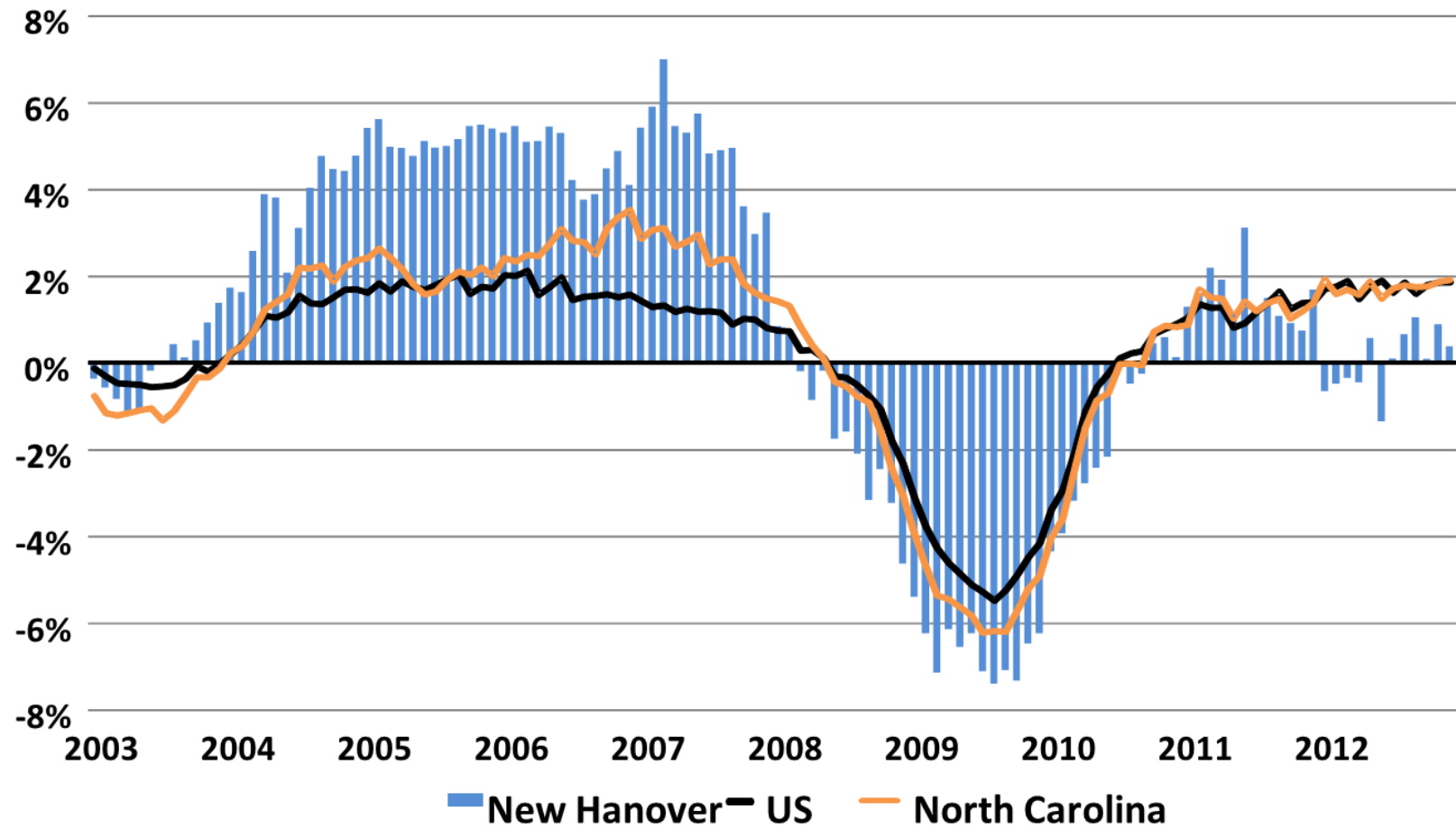
- Executing Effectively (Organizational)
- Building a Better New Hanover (Product improvement)
- Telling the Story (Product marketing)

3

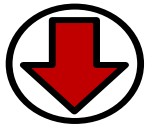


# Why New Hanover County Must Act

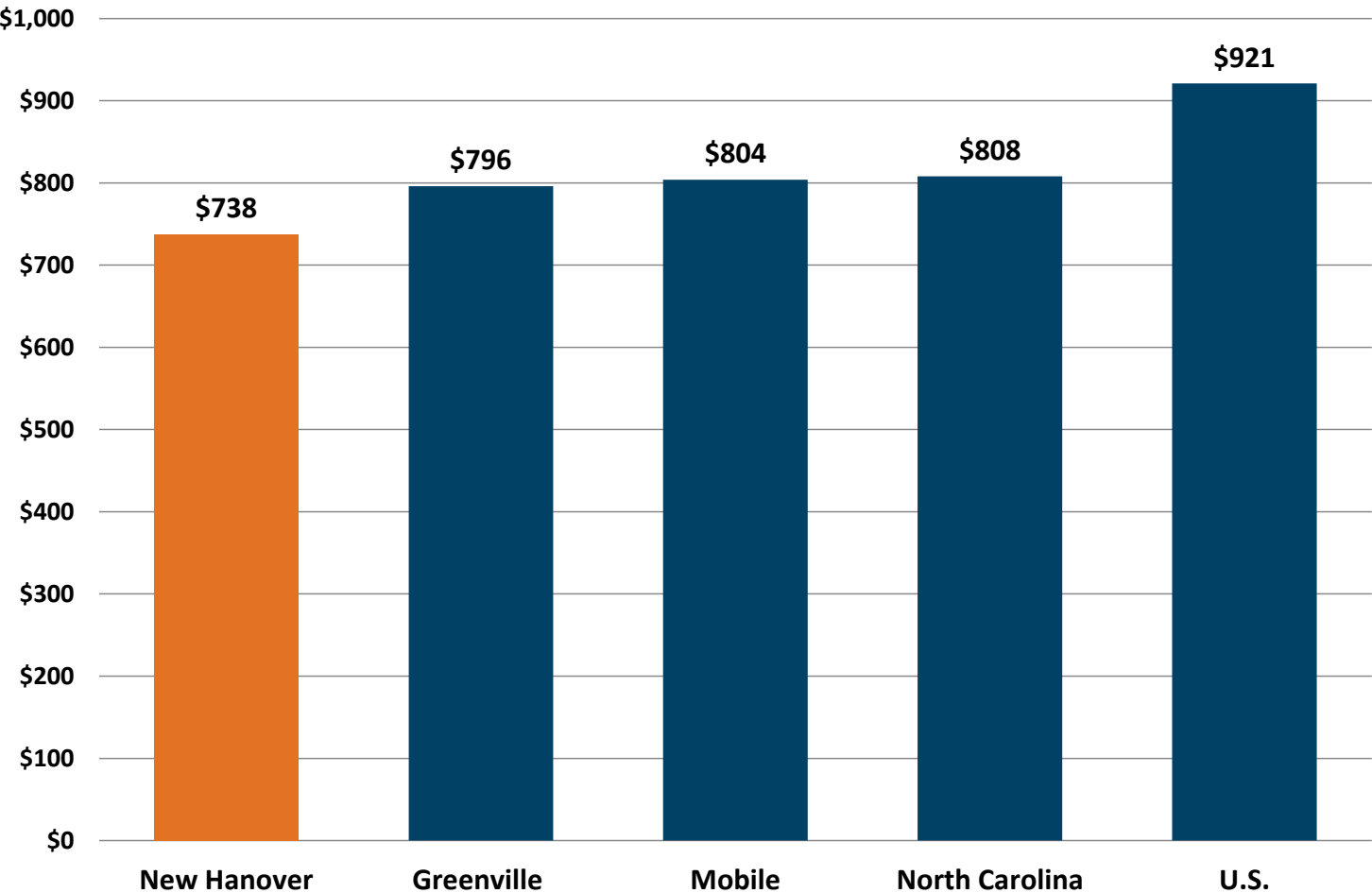
Annual Employment Growth Rate



Source: US Bureau of Labor Statistics



# Average Weekly Wage-2013 2Q



# Average Annual Industry Earnings Comparison

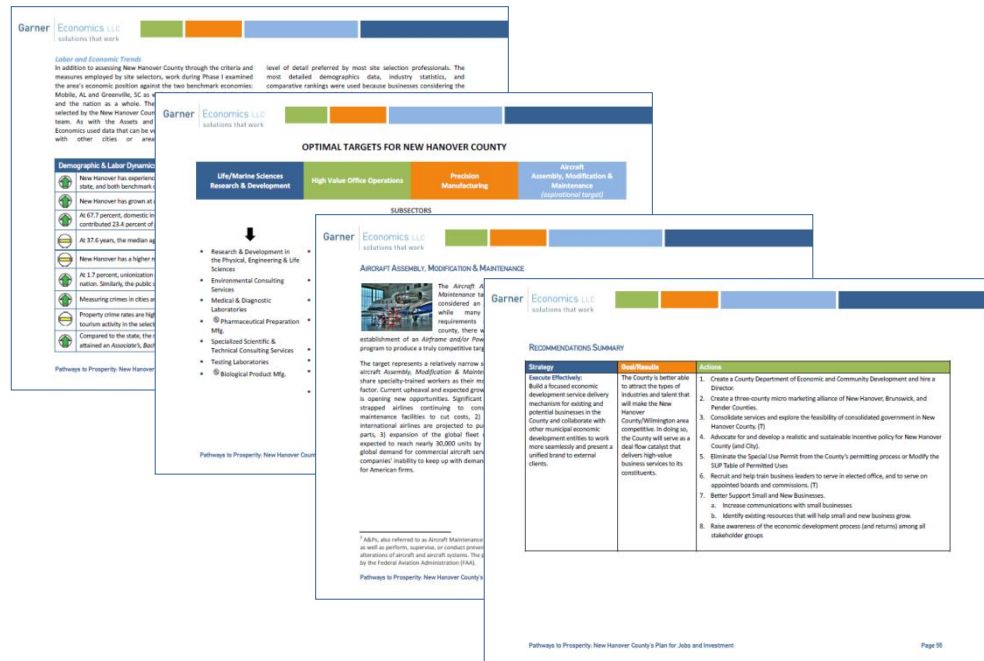
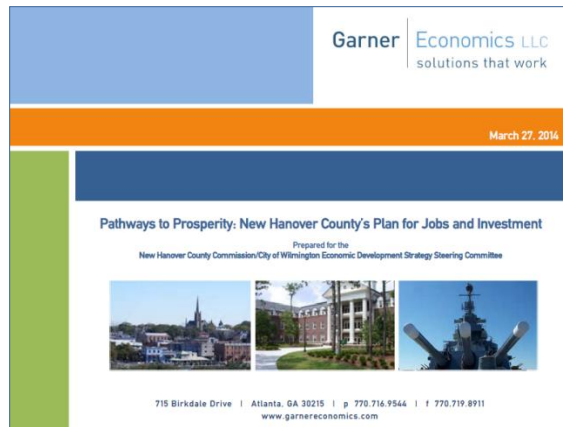
| Largest Employment Sectors        | Amount Above/below Avg wage |
|-----------------------------------|-----------------------------|
| Government                        | \$13,798                    |
| Retail Trade                      | (\$13,623)                  |
| Accommodation & Food Services     | (\$24,861)                  |
| Healthcare & Social Assistance    | \$6,846                     |
| Prof., Scientific & Tech Services | \$18,686                    |
| Real Estate                       | (\$18,154)                  |
| Administrative Services           | (\$12,695)                  |
| Construction                      | \$663                       |
| Manufacturing                     | \$52,841                    |
| Finance and Insurance             | \$20,265                    |
| Arts, Entertainment & Recreation  | (\$23,506)                  |

| Smallest Employment Sectors    | Amount Above/below Avg wage |
|--------------------------------|-----------------------------|
| Wholesale Trade                | \$15,383                    |
| Information                    | \$11,124                    |
| Transportation & Warehousing   | \$639                       |
| Educational Services (Private) | (\$21,051)                  |
| Management of Companies        | \$54,518                    |
| Agriculture, Fishing           | (\$19,261)                  |
| Utilities                      | \$81,550                    |
| Mining                         | (\$15,791)                  |
| <b>Average NHC wage</b>        | <b>\$42,289</b>             |
| <b>NC Average</b>              | <b>\$45,383</b>             |
| <b>US Average</b>              | <b>\$51,548</b>             |



# Project Goal

Strengthen existing business sectors and identify emerging ones to increase private investment, job creation and wage growth



# Project Scope

**The New Hanover Board of Commissioners engaged Garner Economics to answer three fundamental questions:**

- **How competitive is New Hanover County in attracting, growing and retaining companies?**
- **What assets does the County have? Where is it vulnerable?**
- **What role should the County and other organizations play in increasing the area's economic competitiveness?**

# Project Scope

## What this strategy is and isn't:

- ED strategy versus a Community Vision
- A strategy that incorporates recruitment, retention, entrepreneurship
- Product development including talent, business climate and infrastructure enhancements
- Focused on NHC as a whole
- Not a hospitality sector strategy

# Project Governance

*The **14-member** Steering committee, led by Dr. Gary Miller at UNC-Wilmington and Dr. Ted Spring at Cape Fear Community College*

## Steering Committee

- Served as Advisors and provided overall guidance for the project process
- Assessed direction/goals with an eye towards implementation
- Reviewed draft of final report and provided comment and feedback

## County Staff

- Served as point of contact for the project team
- Assisted with logistics and scheduling
- Provided copies of previous reports, specific data, etc.
- Assimilated Steering Committee feedback on final report

# Input from Stakeholders

- Garner Economics held 6 **focus groups** with 101 stakeholders to solicit their perceptions and opinions of the business climate in New Hanover County and the City of Wilmington
- An electronic survey was distributed by economic development partners in the County to a broader audience and had 897 responses
- Input augmented team assessments and analysis



# Common Comments & Concerns

Given their composition, the focus groups' feedback was more focused on economic development issues/concerns; Surveys responses tended to focus on quality of place and broader issues

## Strengths

- Quality of Place
- Recreational Amenities
- Higher Education Opportunities
- ILM and Port
- Arts and Culture Community

## Challenges

- Aging Infrastructure
- Lack of broad employment opportunities
- Cumbersome and onerous regulations
- Lack of leadership
- Poor worker quality
- Lack of available sites

# What Citizens Want the County to Do

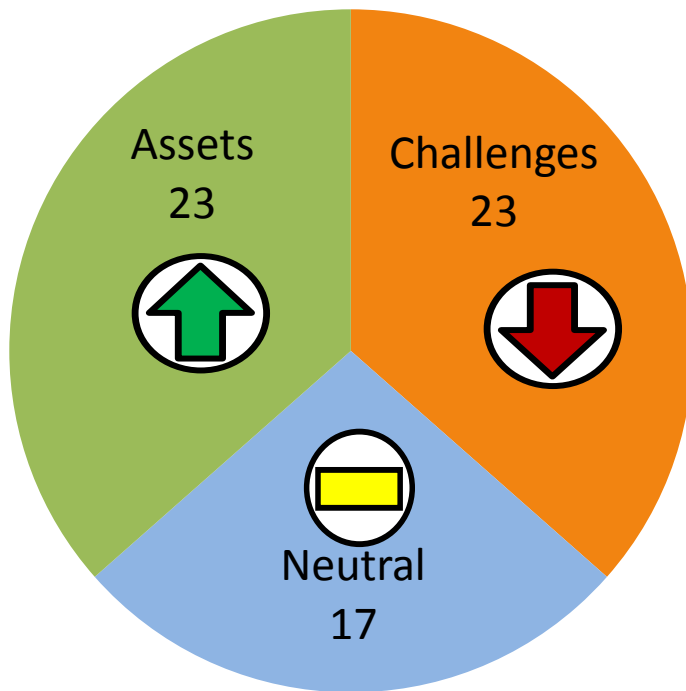
Top actions leadership should take to strengthen the area's ability to attract and retain quality companies and talent

1. Create a shared vision for economic development for the City and County and set priorities based on that vision
2. Find ways to consolidate the City and County government
3. Look at the larger region
4. Improve K-12 education and create stronger linkages between schools, higher ED, and businesses
5. Greatly enhance the region's infrastructure and be more proactive in addressing updates/repairs
6. Cultivate true leadership—both within government and among the corporate and business leaders



# Assets and Challenges Assessment

Garner Economics analyzed New Hanover County against 63 factors—the same used when conducting a site/community evaluation for a company that is considering a new location, expansion, consolidation or closure.



**Challenge:** a weakness of a specific variable that could be an impediment to economic development success

**Neutral:** a variable that is considered normal or average

**Asset:** a variable that is ranked exemplary and as such should be promoted

*\*Neutral ratings are noted in the Competitive Realities Report*

# Strengths

## Access to Markets

- Well positioned to serve international markets
- Port facilities (water or inland)
- Within 1 hour of commercial air passenger service

## Government Impact

- Availability of water and wastewater capacity
- Availability of state or local labor training incentives
- Local SAT scores
- Quality of post-secondary education

## Labor

- Availability of technicians & scientists
- Cost of labor
- Level of local unionization
- Availability of post-secondary vocational training
- Availability of on-the-job training assistance
- Within 1/2 hour of major university/college

# Strengths

## Quality of Place

- Availability of executive-level housing
- Availability of moderate-cost housing
- Level of cultural activity
- Availability of diverse recreational opportunities
- Level of air pollution
- Attractiveness of the physical environment
- General appearance of the community
- **Availability of medical care**
- Quality of local restaurants
- Appearance of the Central Business District (City of Wilmington)

# Weaknesses



## Access to Markets

- Not centrally located for national market access

## Labor

- Lack of availability of skilled industrial workers
- Lack of availability of managerial personnel
- Lack of availability of engineering program

## Resources

- Lack of availability of agricultural products and/or commercial fisheries for food processing
- Lack of availability of manufacturing processes/percent of workforce in manufacturing
- Cost of electricity for industrial use (compared to the benchmark counties)

# Weaknesses



## Economic Development

- Low level of cooperation between various organizations involved in economic development activity
- Low level of awareness of community regarding economic development

## Access to Capital

- Lack of local property tax exemptions for industrial facilities (NC prohibits property tax abatements)

## Available Space

- Lack of availability of fully served and attractive industrial sites
- Lack of reasonably priced sites
- Lack of availability of suitable industrial and warehouse space (buildings)

# Weaknesses



## Government Impact

- Lack of adequate water and sewer lines to industrial sites
- Low traffic-carrying capacity of local streets and highways
- Local business permitting procedures and costs
- Zoning policies
- State business tax climate (Tax Foundation)
- State and local sales (higher than the benchmarks)

## Quality of Place

- Climate and natural disaster data related to risk

# What's Important to Companies?

## BUSINESS FACTORS

1. Availability of skilled labor
2. Highway accessibility
3. Labor Costs
4. Occupancy or construction costs
5. Availability of advanced ICT services
6. Available buildings and sites
7. Corporate tax rate
8. State and local incentives
9. Low union profile
10. Energy availability and costs
11. Tax exemptions
- 11T. Right-to-work state










## QUALITY-OF-PLACE FACTORS

1. Low crime rate
2. Healthcare facilities
3. Housing costs
4. Ratings of public schools
5. Housing availability
6. Recreational opportunities
7. Colleges and universities in area
- 7T. Climate
8. Cultural opportunities

Source: Area Development Magazine 2014







# How New Hanover County Ranks:

| QUALITY-OF-PLACE FACTORS                  |      |           |   |
|---|------|-----------|---|
| Ranking                                   | 2013 | 2012      | NHC Score   |
| 1. Low crime rate                         | 80.9 | 79.3 (1)  |    |
| 2. Healthcare facilities                  | 79.7 | 69.8 (2)  |    |
| 3. Housing costs                          | 75.3 | 66.9 (4)  |    |
| 4. Ratings of public schools (SAT scores) | 73.0 | 63.3 (5)  |    |
| 5. Housing availability                   | 71.5 | 69.8 (2T) |    |
| 6. Recreational opportunities             | 66.4 | 52.9 (8)  |   |
| 7. Colleges and universities in area      | 59.5 | 61.6 (6)  |  |
| 7T. Climate (natural disaster risk)       | 59.5 | 55.0 (7)  |  |
| 8. Cultural opportunities                 | 54.8 | 48.9 (9)  |  |

Source: Area Development Magazine 2014

# How New Hanover County Ranks:

## SITE SELECTION FACTORS AS NOTED BY COMPANIES

| Ranking                                  | 2013 | 2012      | NHC Score   |
|--|------|-----------|---|
| 1. Availability of skilled labor         | 95.1 | 89.4 (3)  | Mixed based on type   |
| 2. Highway accessibility                 | 93.5 | 90.1 (2)  |    |
| 3. Labor Costs                           | 90.8 | 90.8 (1)  |    |
| 4. Occupancy or construction costs       | 87.4 | 82.8 (5)  | NA  |
| 5. Availability of advanced ICT services | 84.6 | 85.1 (4)  |    |
| 6. Available buildings and sites         | 83.3 | 78.4 (8)  |    |
| 7. Corporate tax rate (NC ranks 29)      | 82.4 | 79.3 (7)  |    |
| 8. State and local incentives            | 81.9 | 71.1 (13) |   |
| 9. Low union profile                     | 81.4 | 73.5 (10) |    |
| 10. Energy availability and costs        | 80.8 | 81.3 (6)  |    |
| 11. Tax exemptions                       | 80.6 | 75.4 (9)  |    |
| 11T. Right-to-work state                 | 80.6 | 72.6 (11) |    |

Source: Area Development Magazine 2014



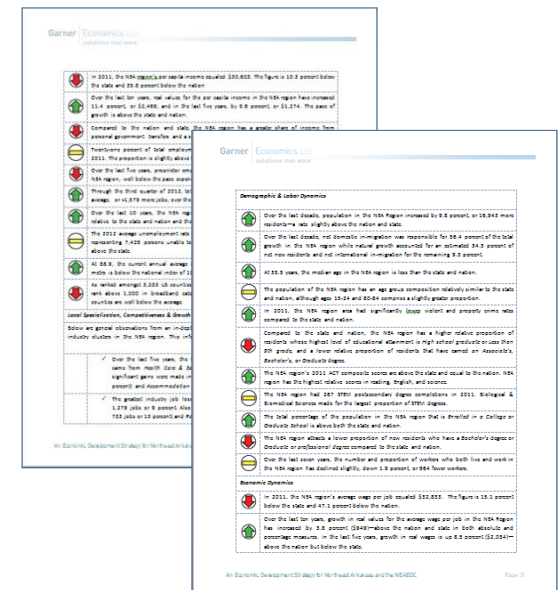
# How New Hanover County Compares

- Examined the economic position and competitiveness of New Hanover County
- Compared the region to Mobile County, AL; Greenville County, SC; North Carolina; and the US

# Dashboard Indicators

## Three Main Sections

- Demographic & Labor Dynamics
- Economic Dynamics
- Local Specialization, Competitiveness & Growth



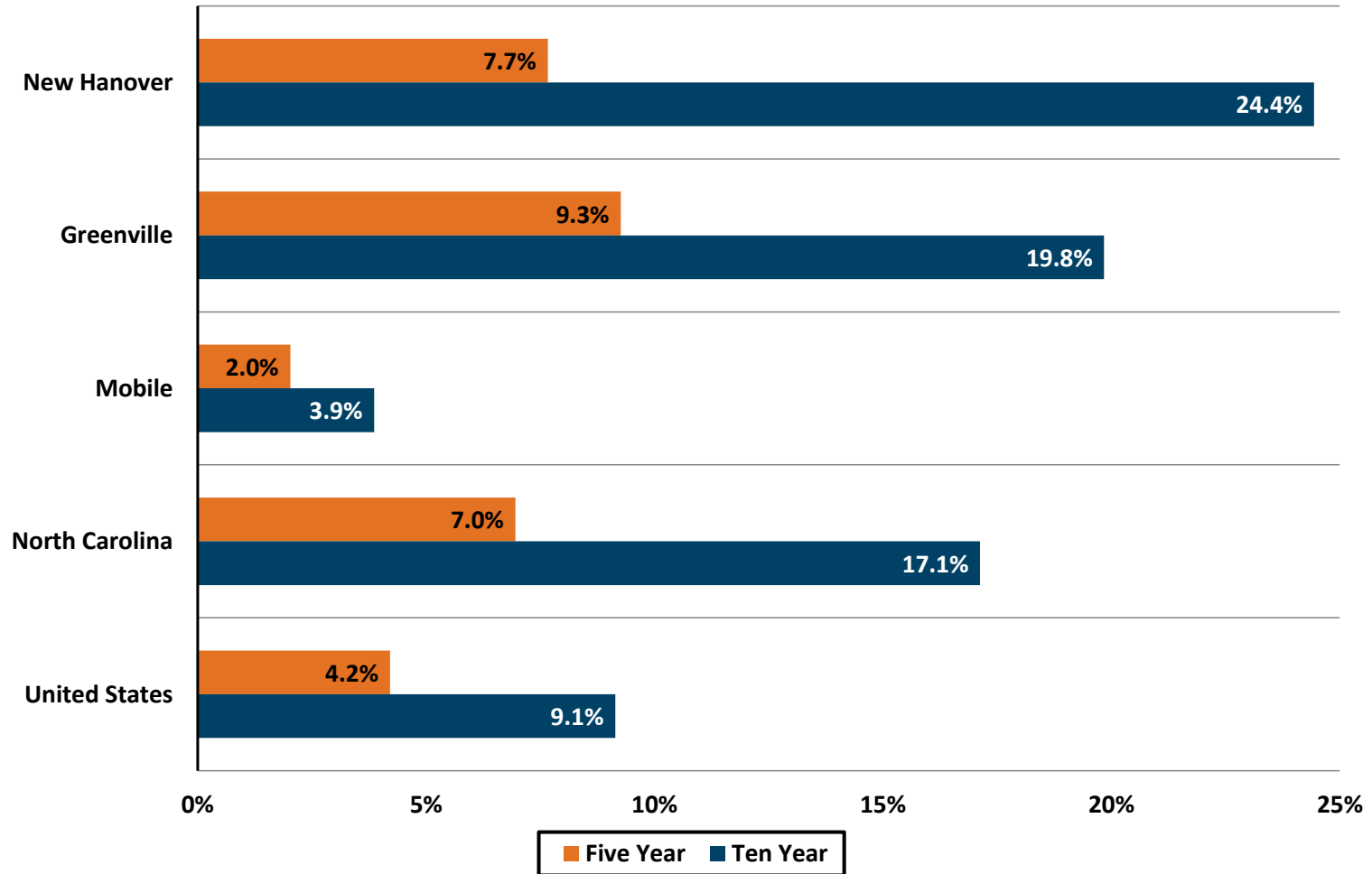
# Demographic and Labor Dynamics



- Population and Growth
- Age
- Crime
- Education/SAT Scores
- STEM Completions
- Unionization
- Worker Flows

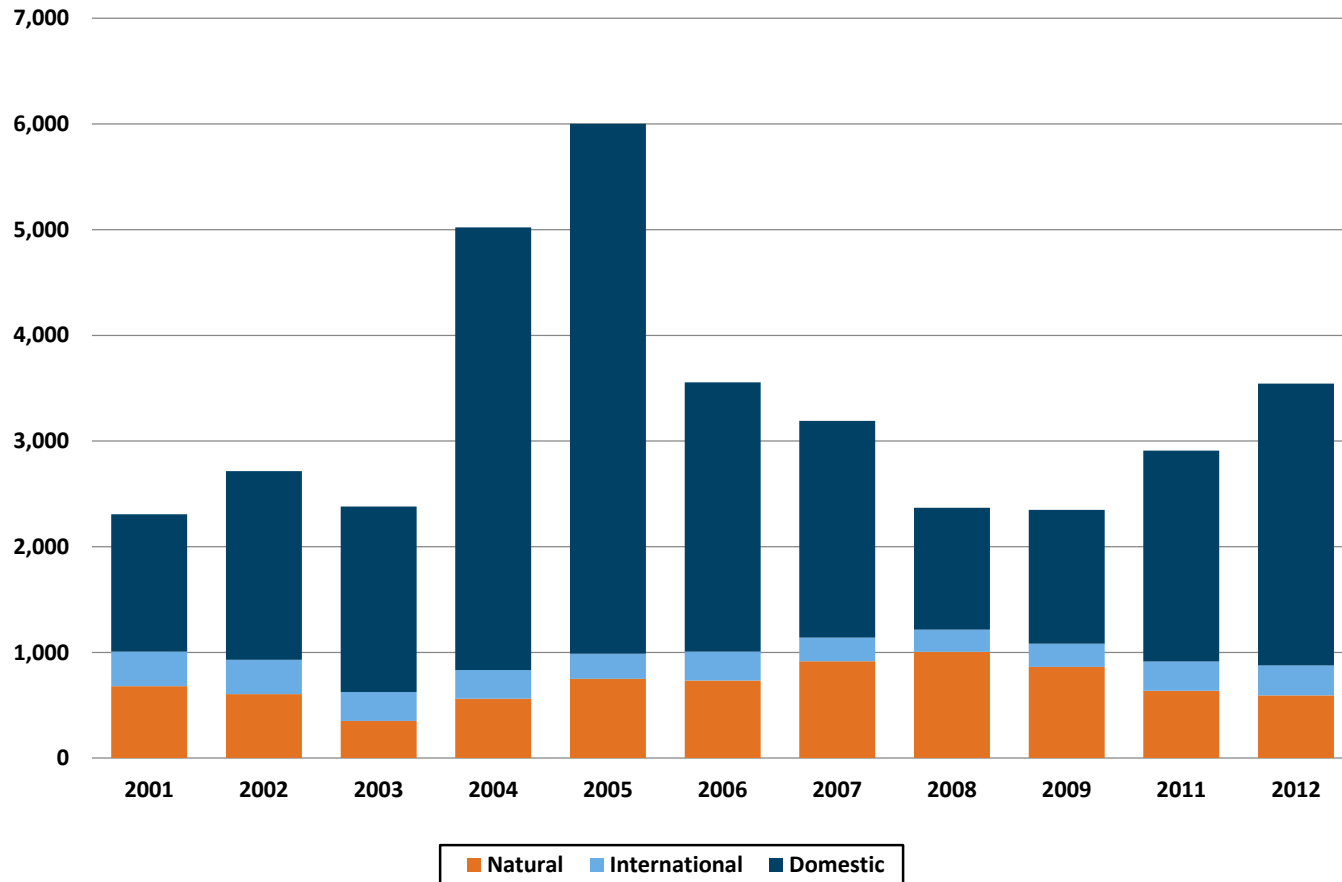


## 2000-2012 Population Change (%)





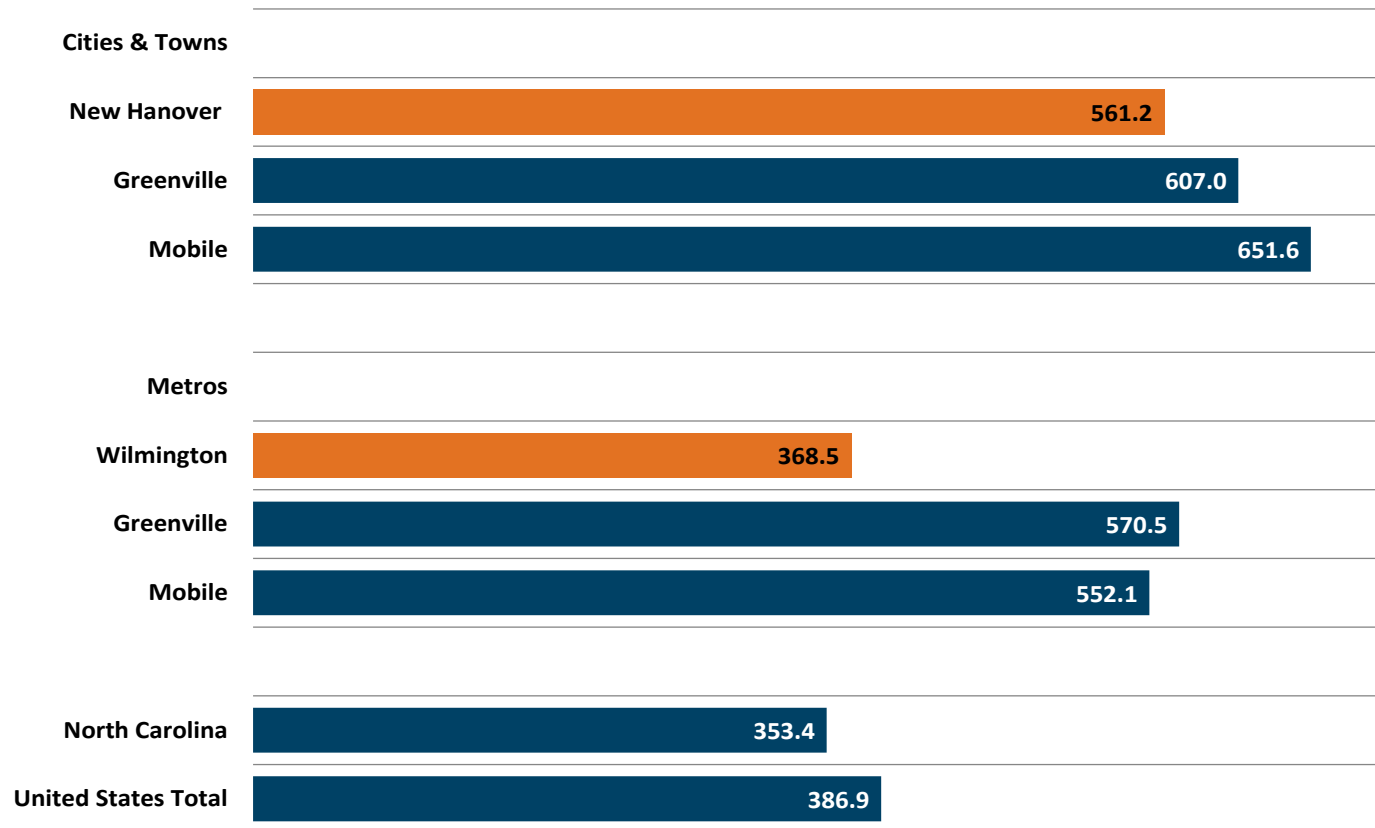
# Sources of New Residents

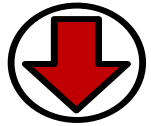




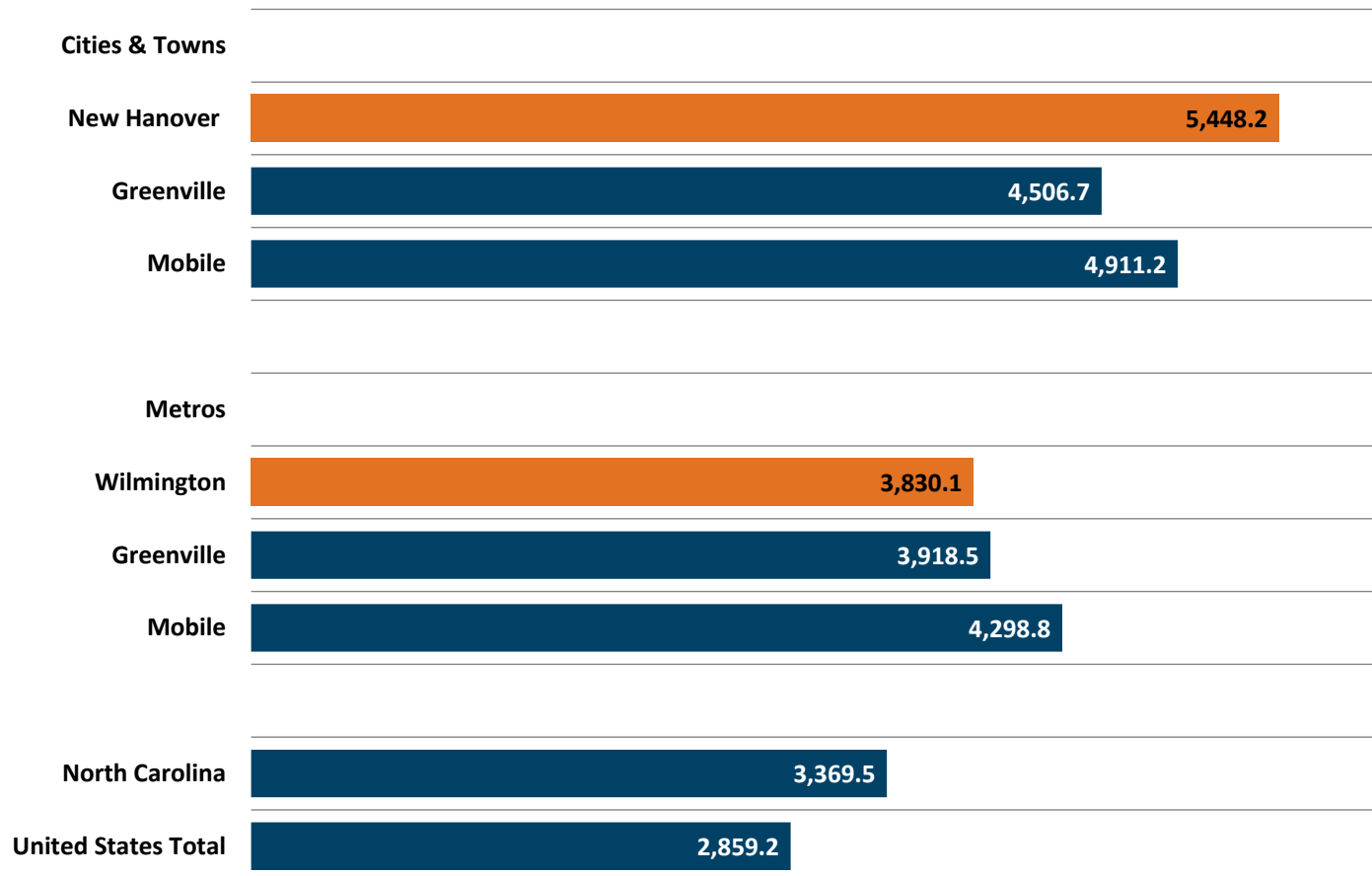


# Violent Crime Rates per 100,000 Residents 2012



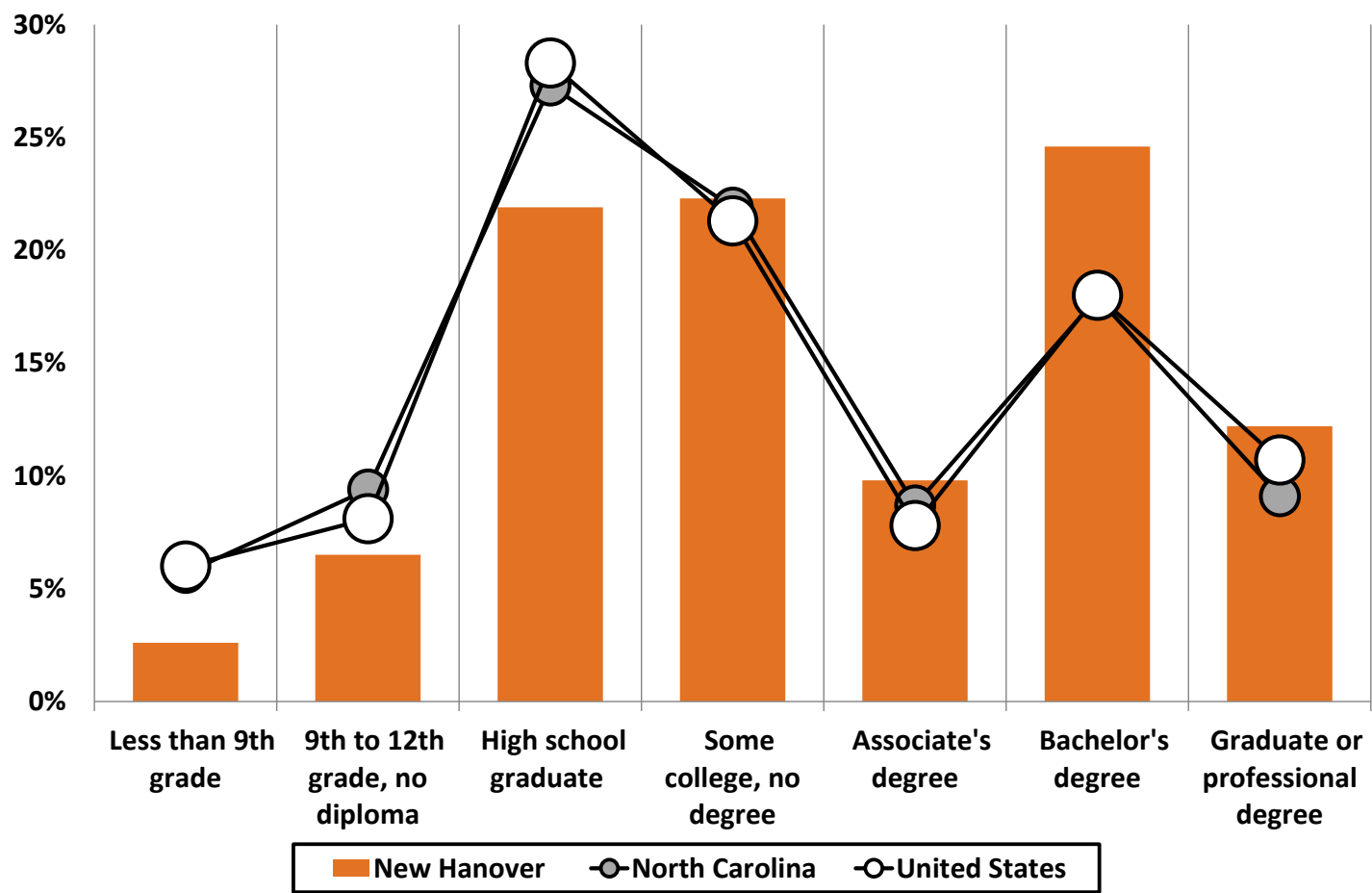


# Property Crime Rates per 100,000 Residents 2012



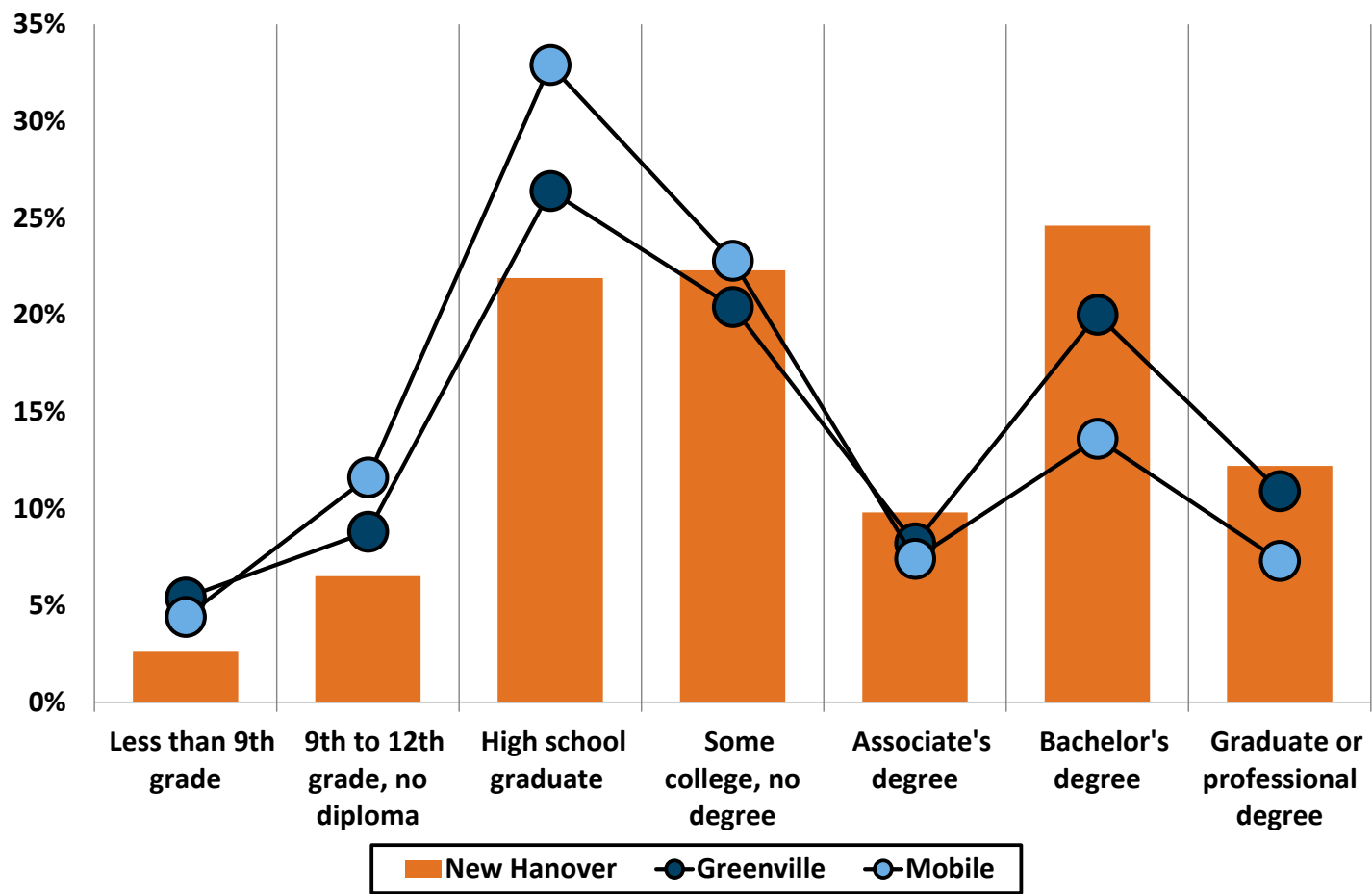


# Educational Attainment: % Total Population Age 25+



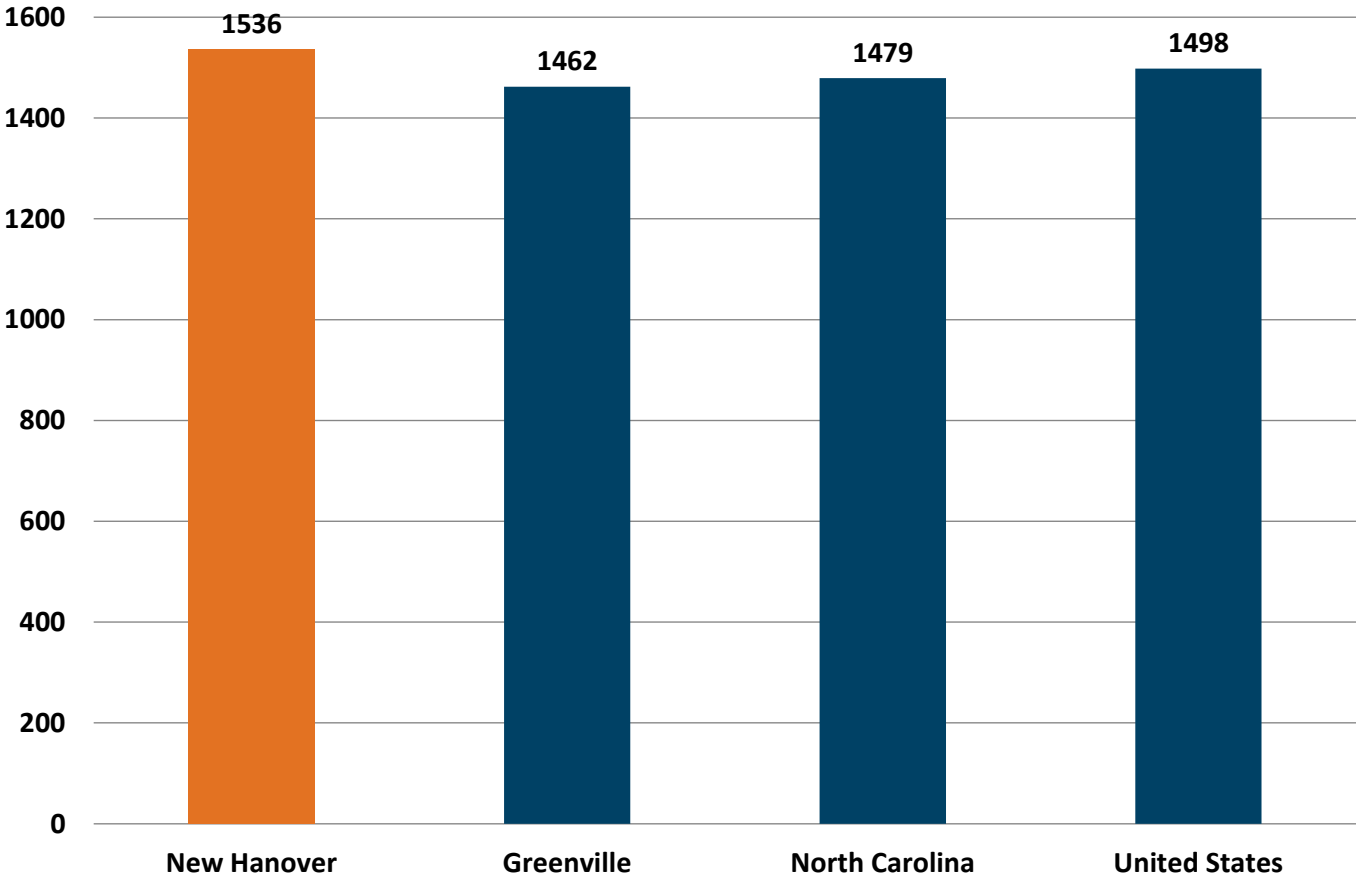


# Educational Attainment: % Total Population Age 25+

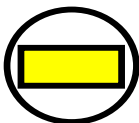




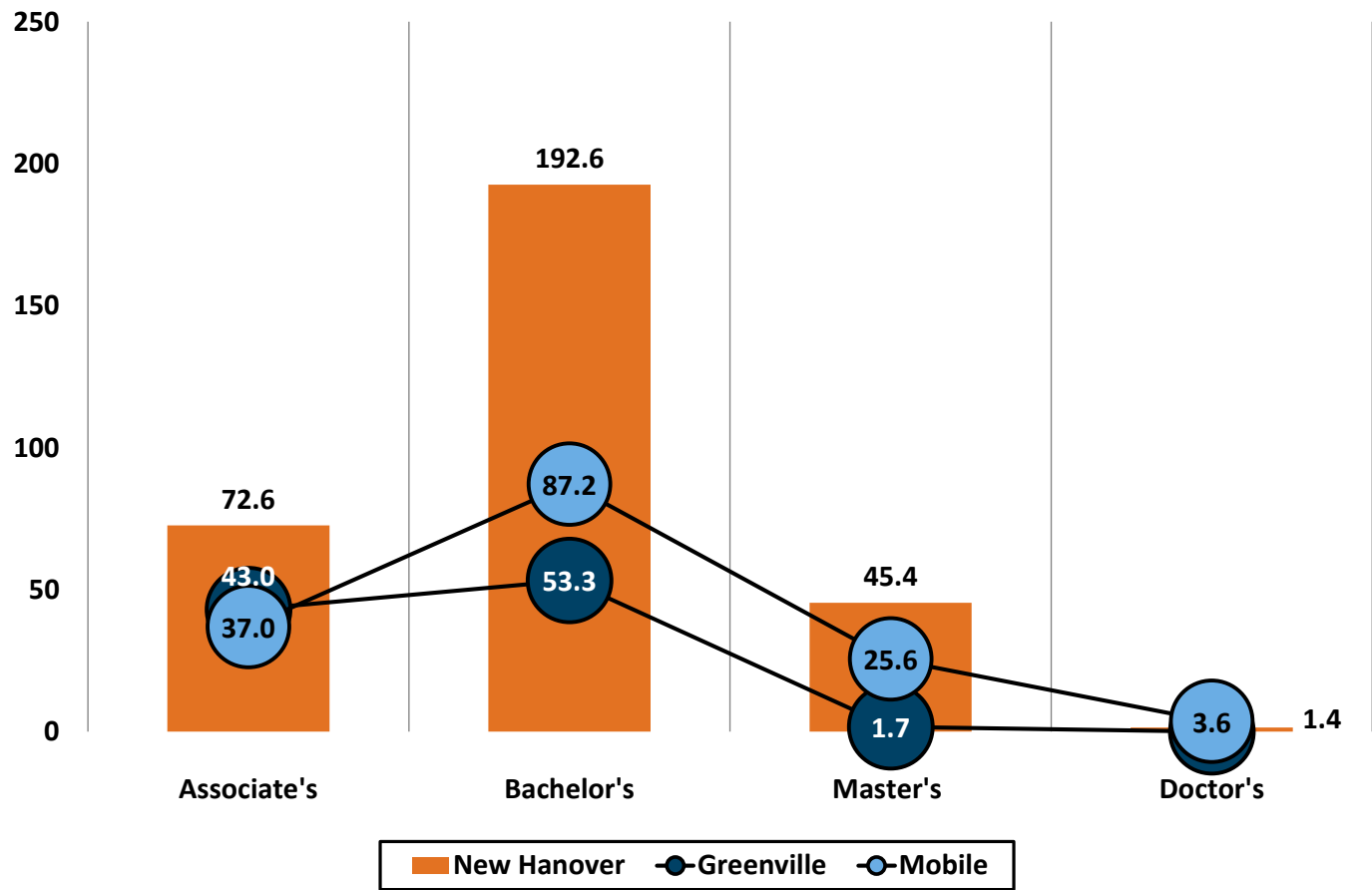
# 2012 SAT Combined Scores



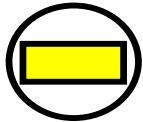
Source: South Carolina Department of Education,  
North Carolina Department of Public Instruction, Garner Economics



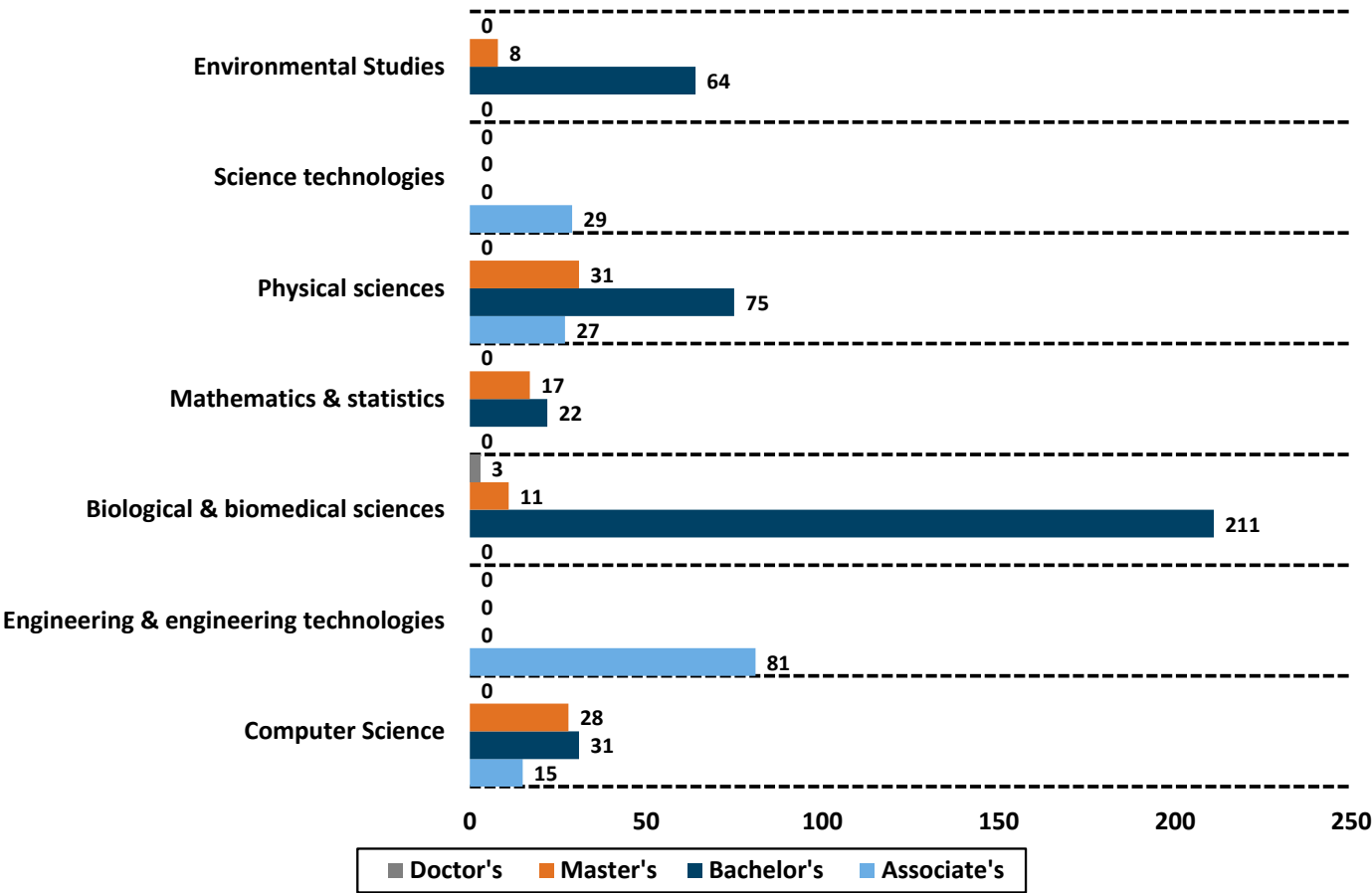
# 2012 STEM Degree Completions Per 100,000 Residents



Source: National Center for Education Statistics, Garner Economics



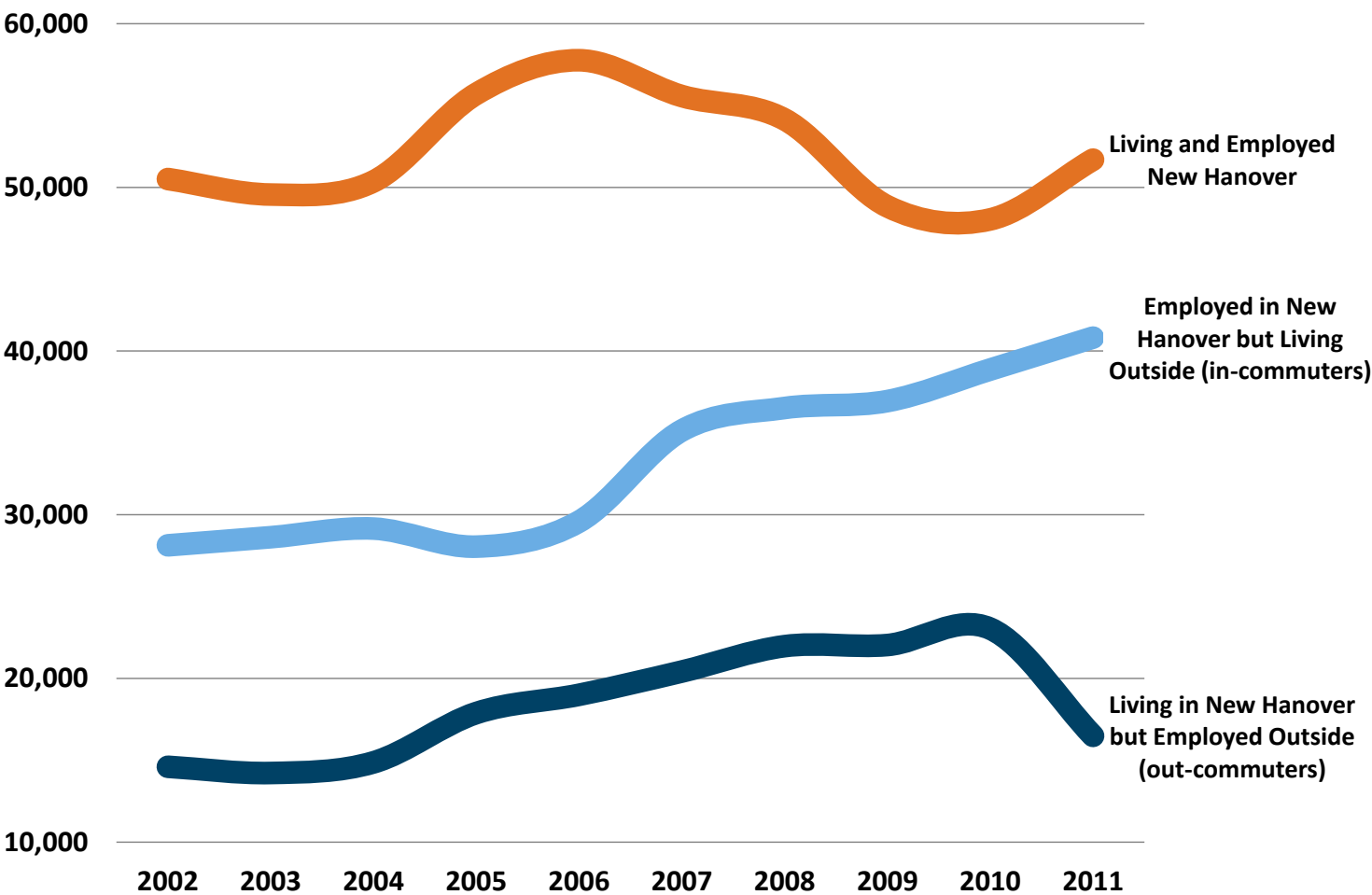
# 2012 STEM Degree Completions







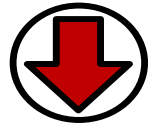
# Worker Flows



# Economic Dynamics

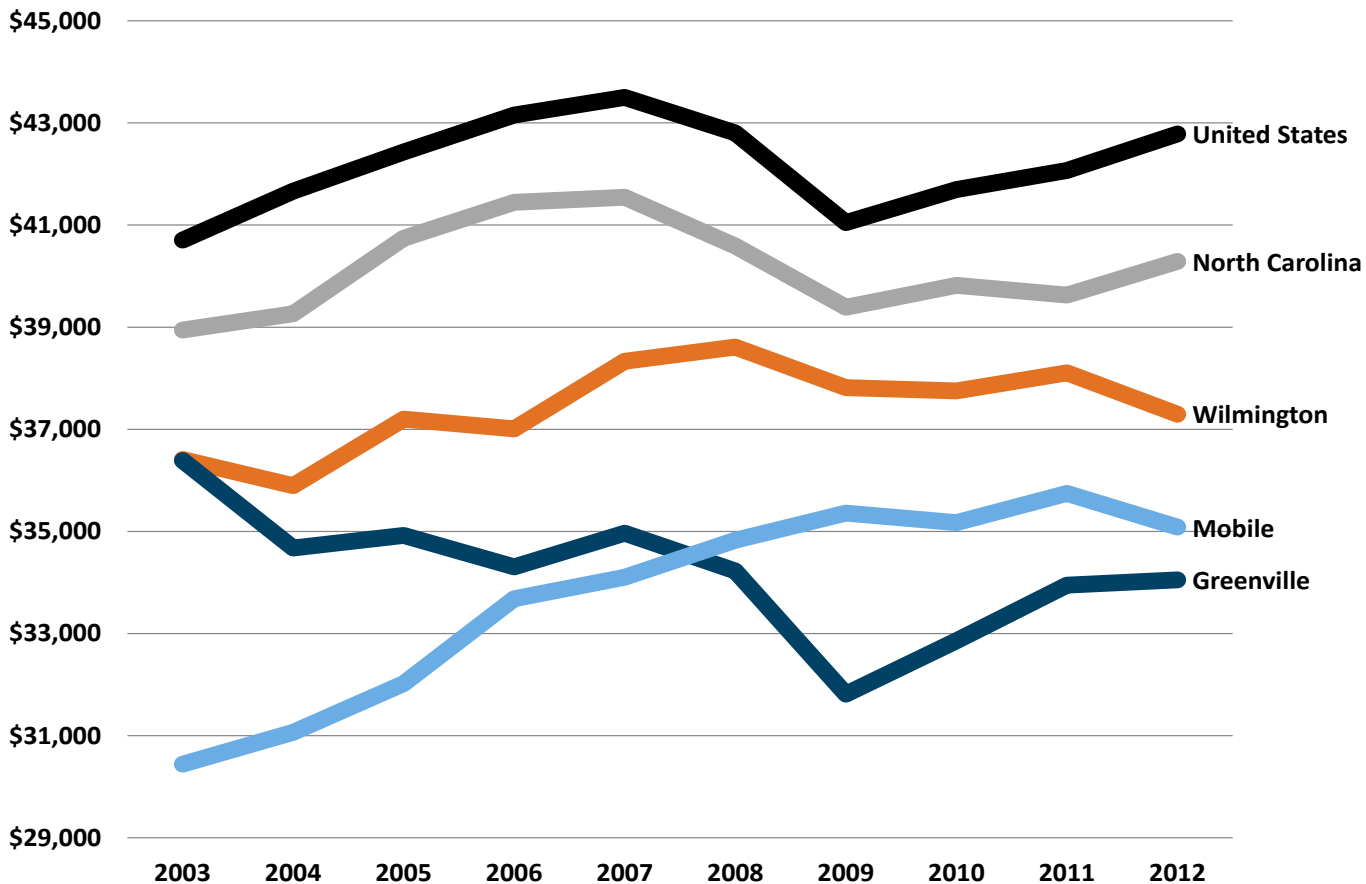


- Wages
- Income
- Self-Employment
- Employment Trends
- Unemployment
- Cost of Living
- Broadband Access
- Air Connectivity



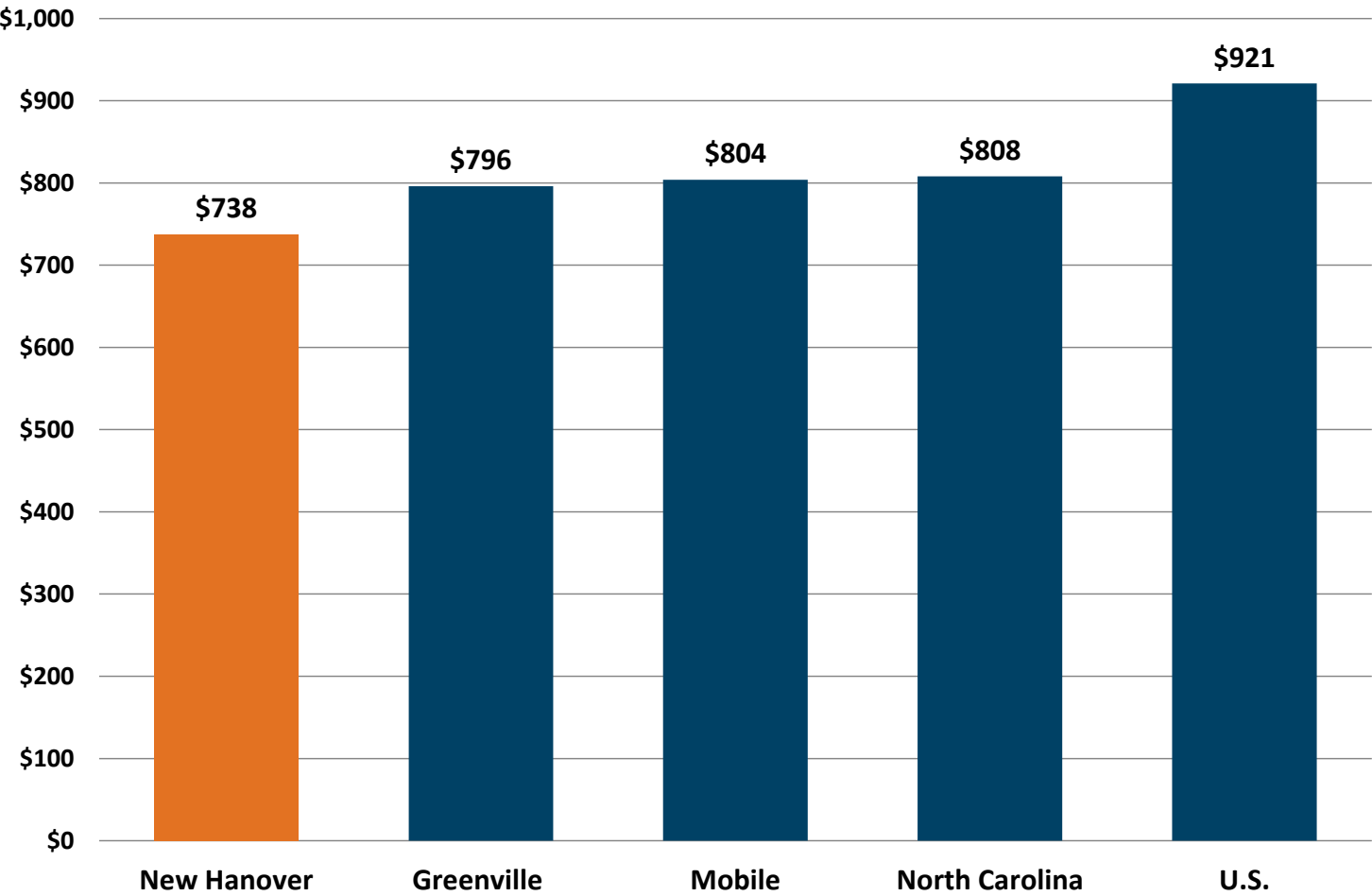
# Per Capita Real Gross Domestic Product

(inflation adjusted to 2005)



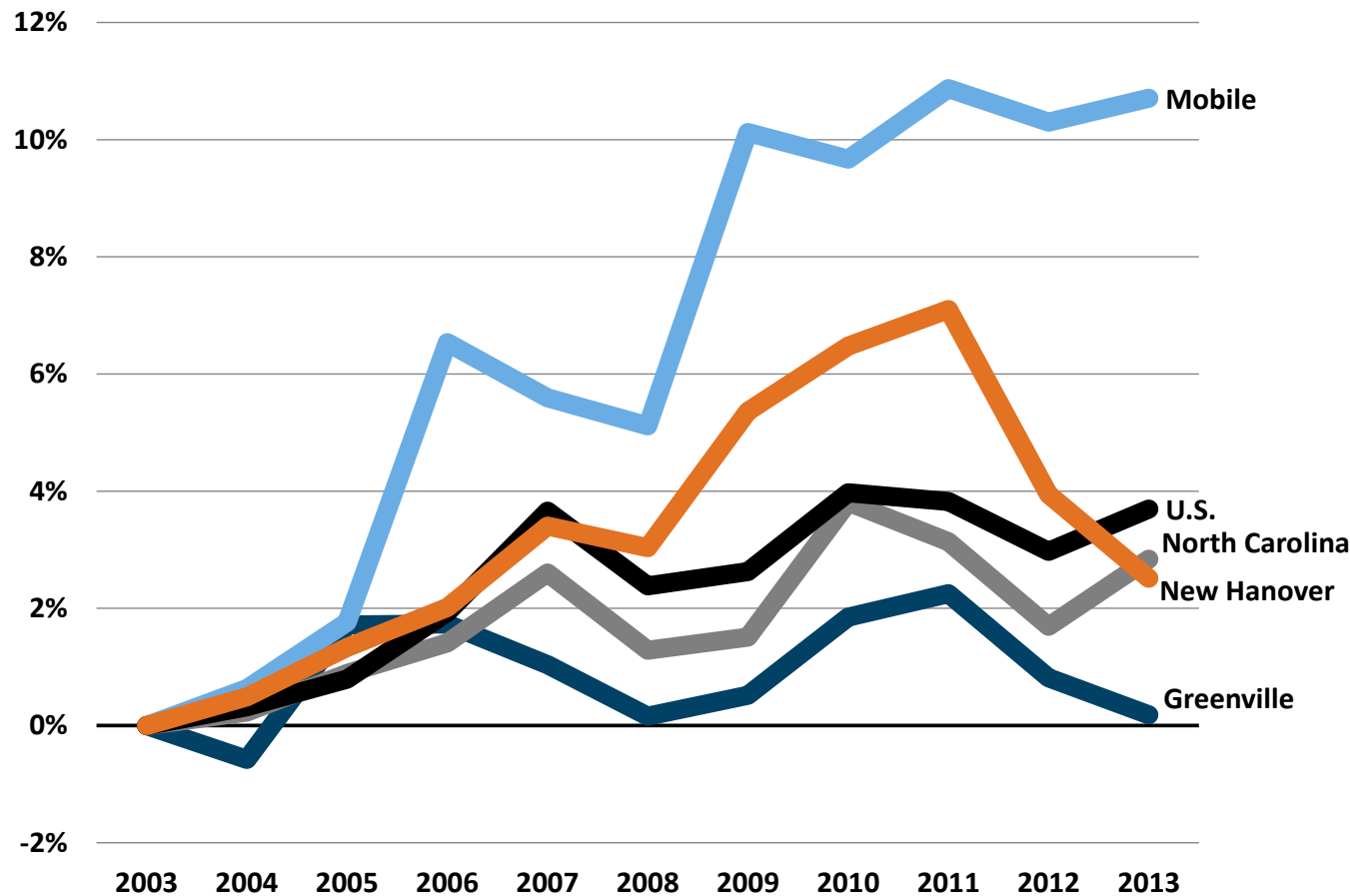


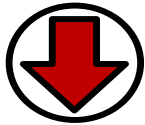
# Average Weekly Wage-2013 2Q



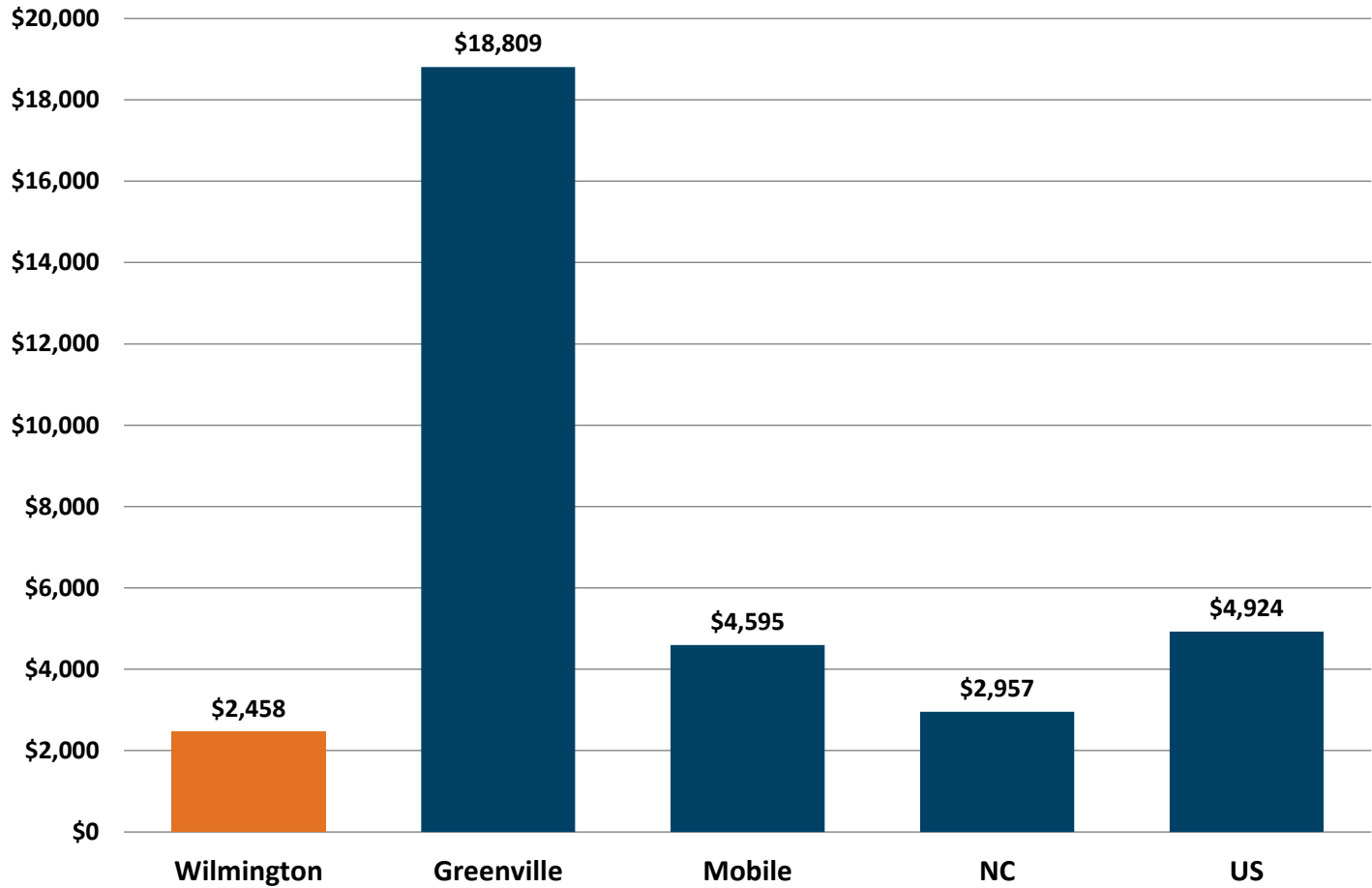


# Ten Year Change in Average Wage Per Job (2003=0)





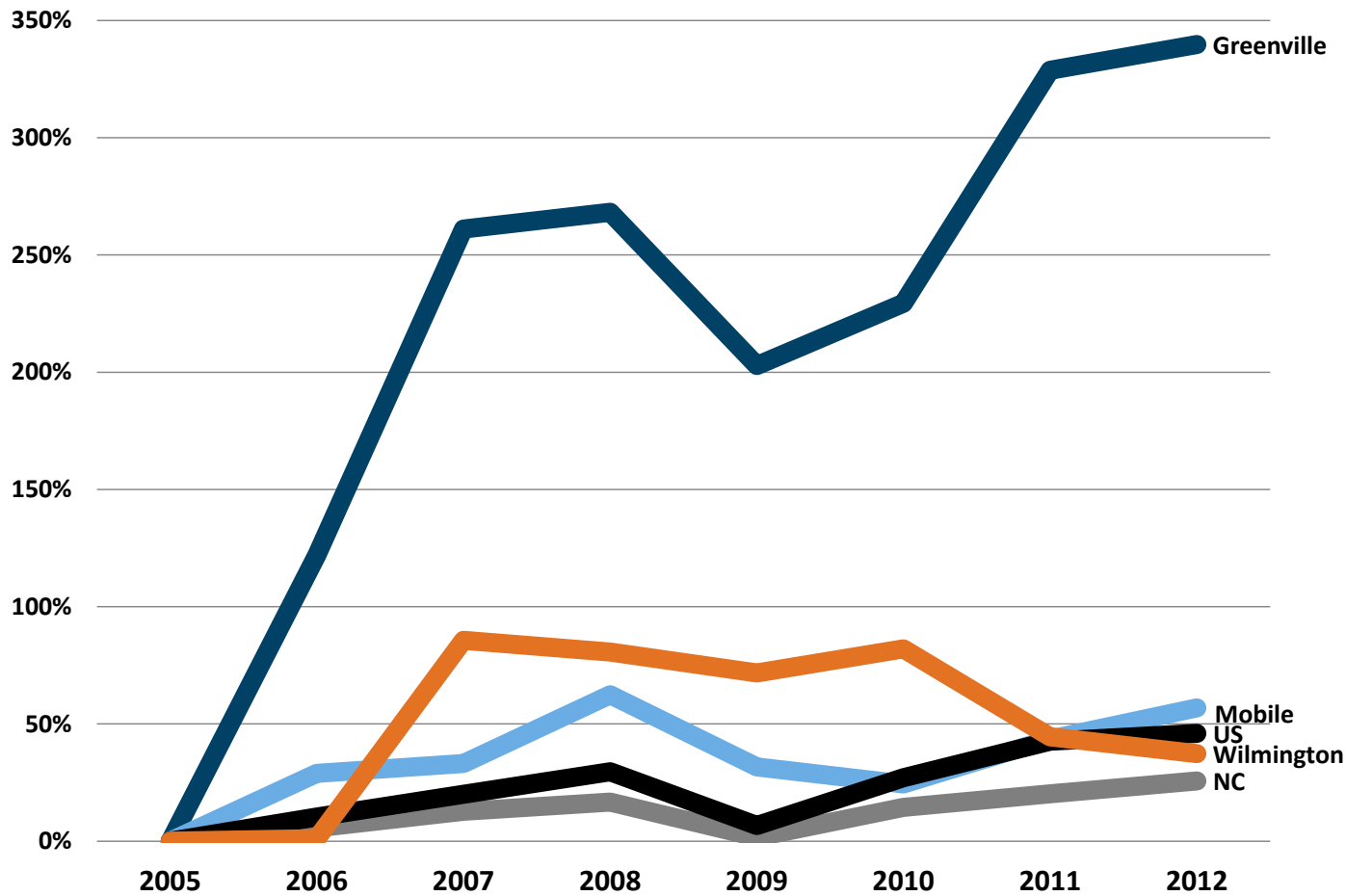
# Per Capita Exports- 2012



Source: Office of Trade and Industry Information, Manufacturing and Services,  
International Trade Administration, U.S. Department of Commerce, Garner Economics



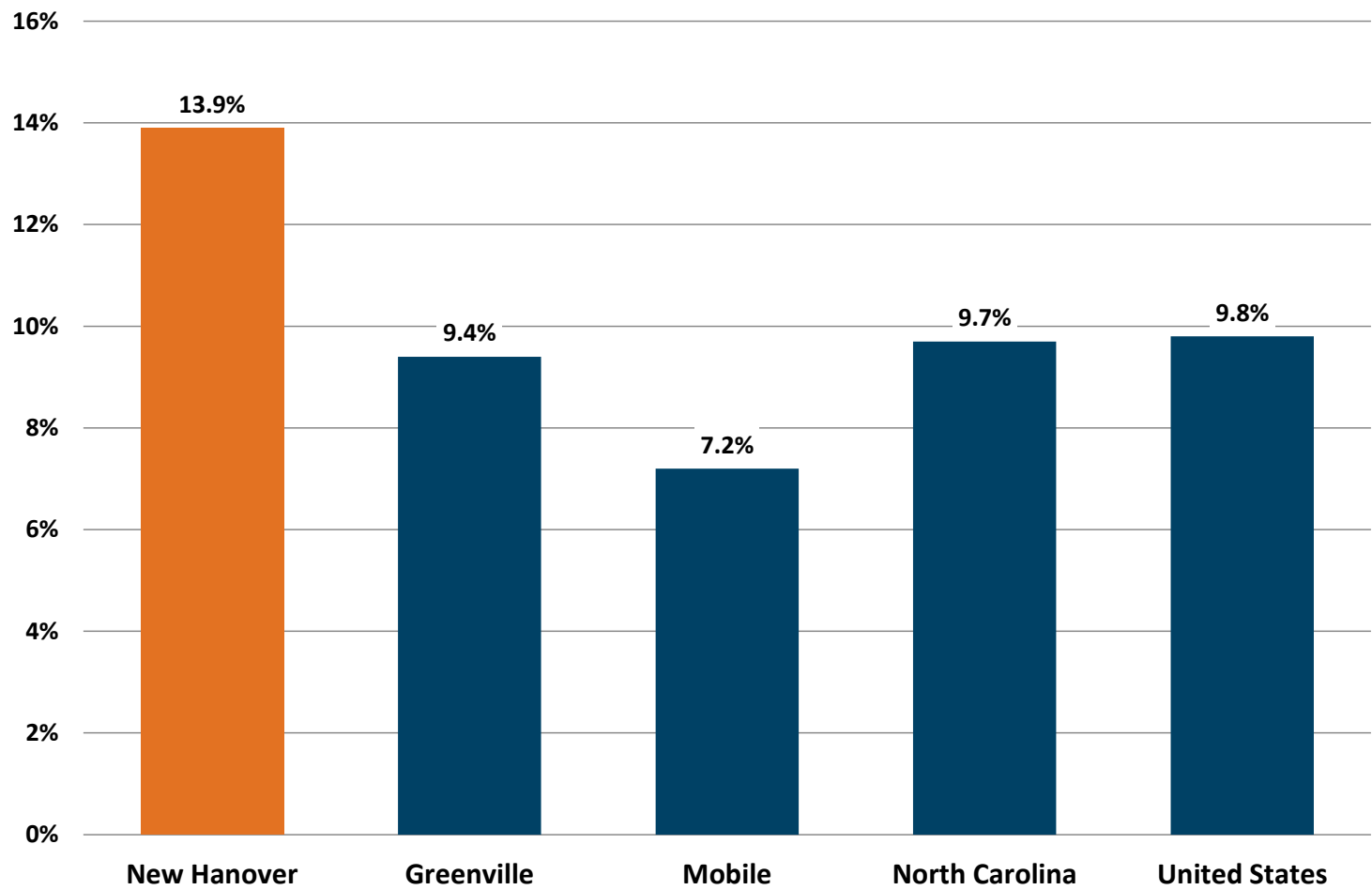
# Percent Export Change- (2005=0)



Source: Office of Trade and Industry Information, Manufacturing and Services,  
International Trade Administration, U.S. Department of Commerce, Garner Economics



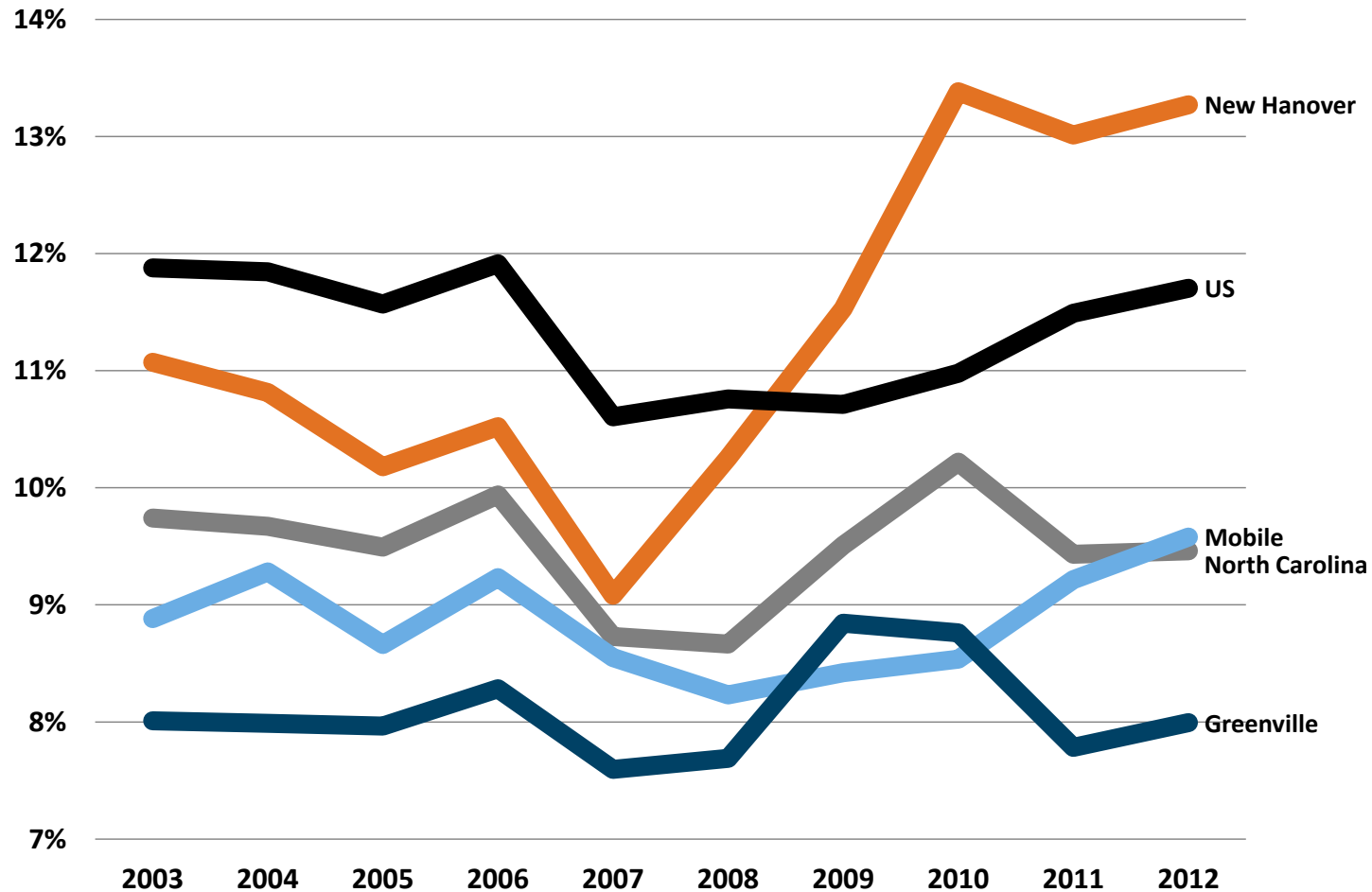
# Self-Employed as a Percent of All Occupations

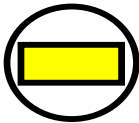




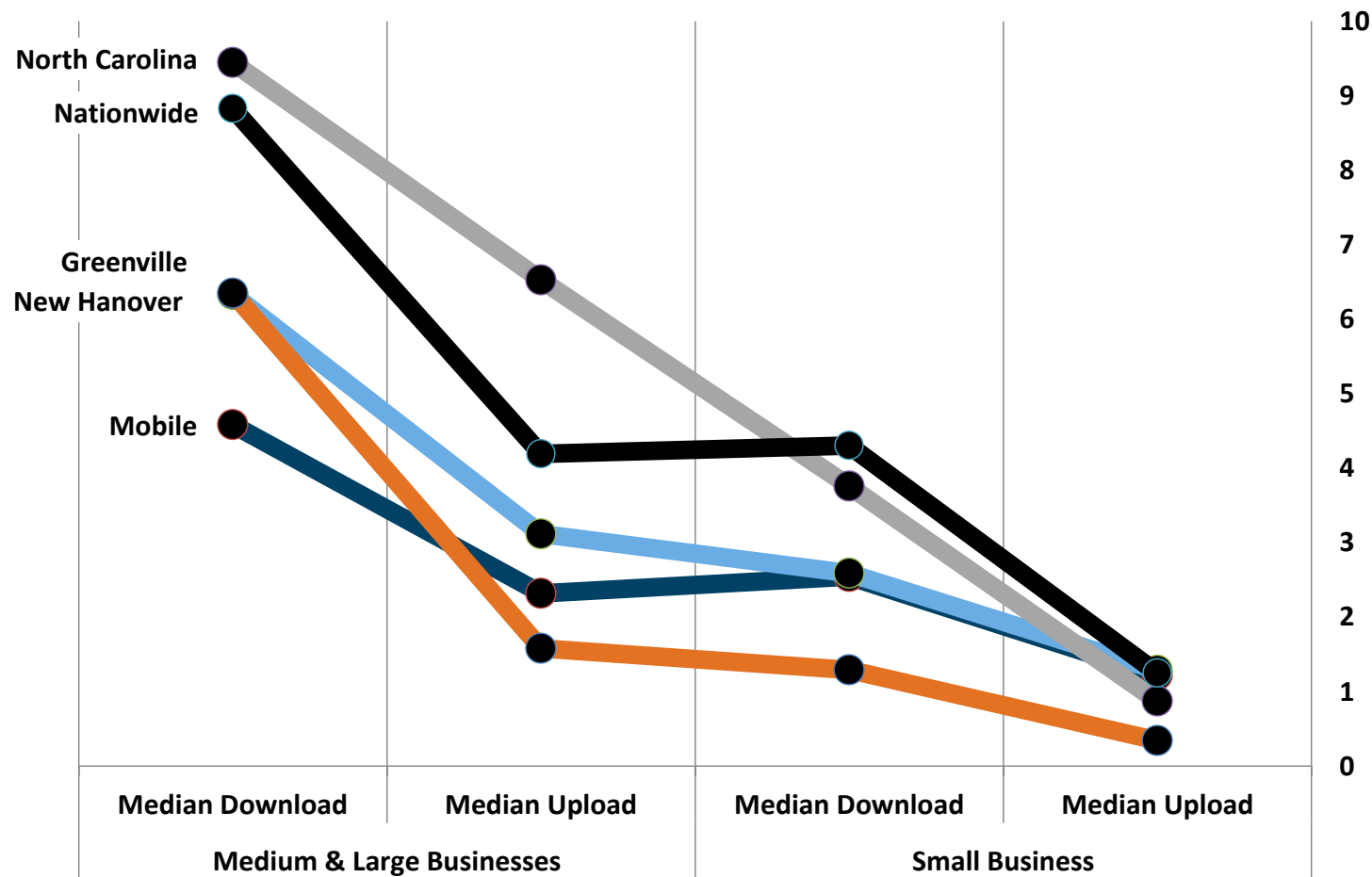


# Nonfarm Proprietors As Percent of Total Earnings





# Broadband Speed 2012 (Mbps)

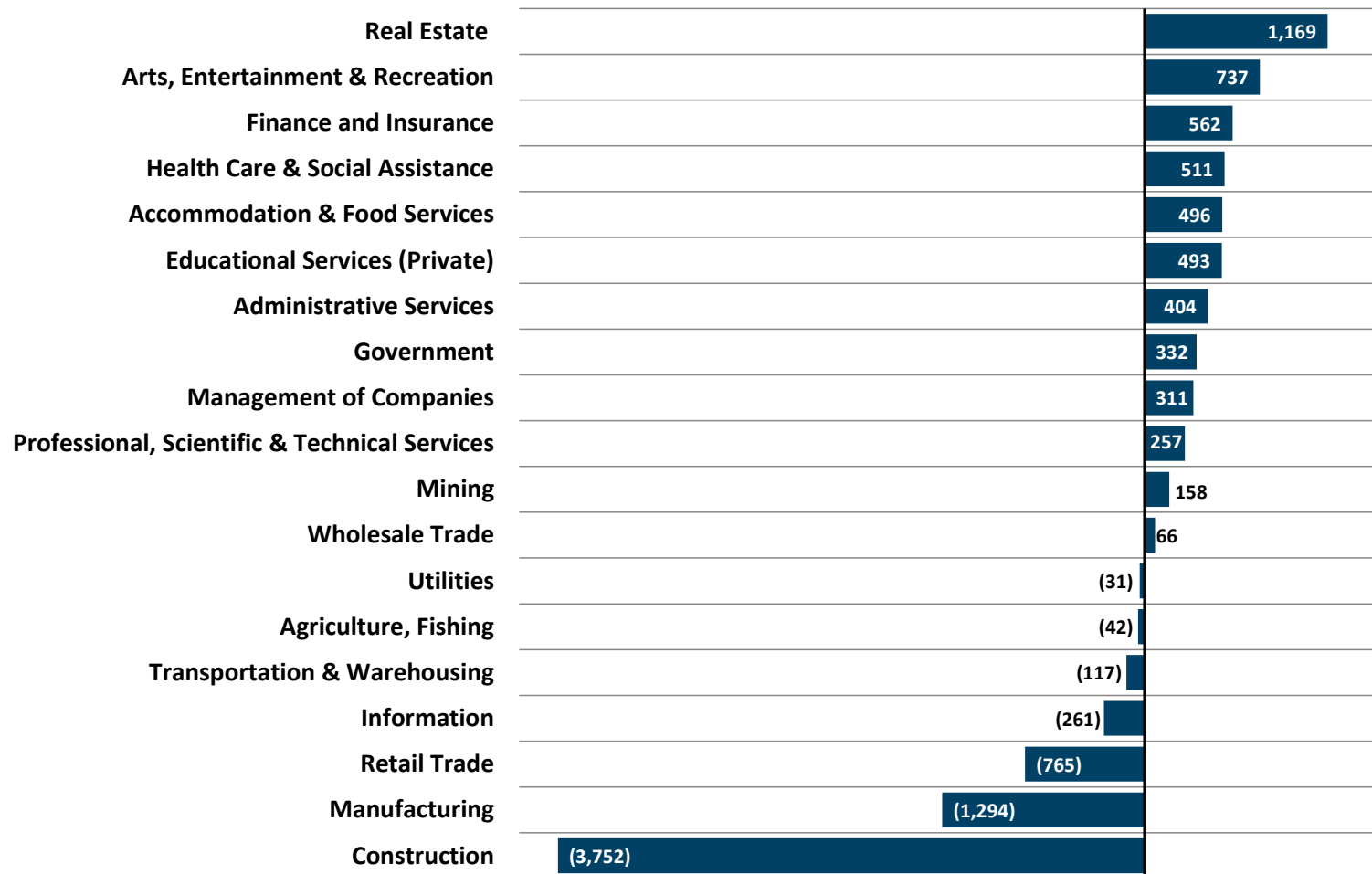


# Local Specialization, Competitiveness & Growth

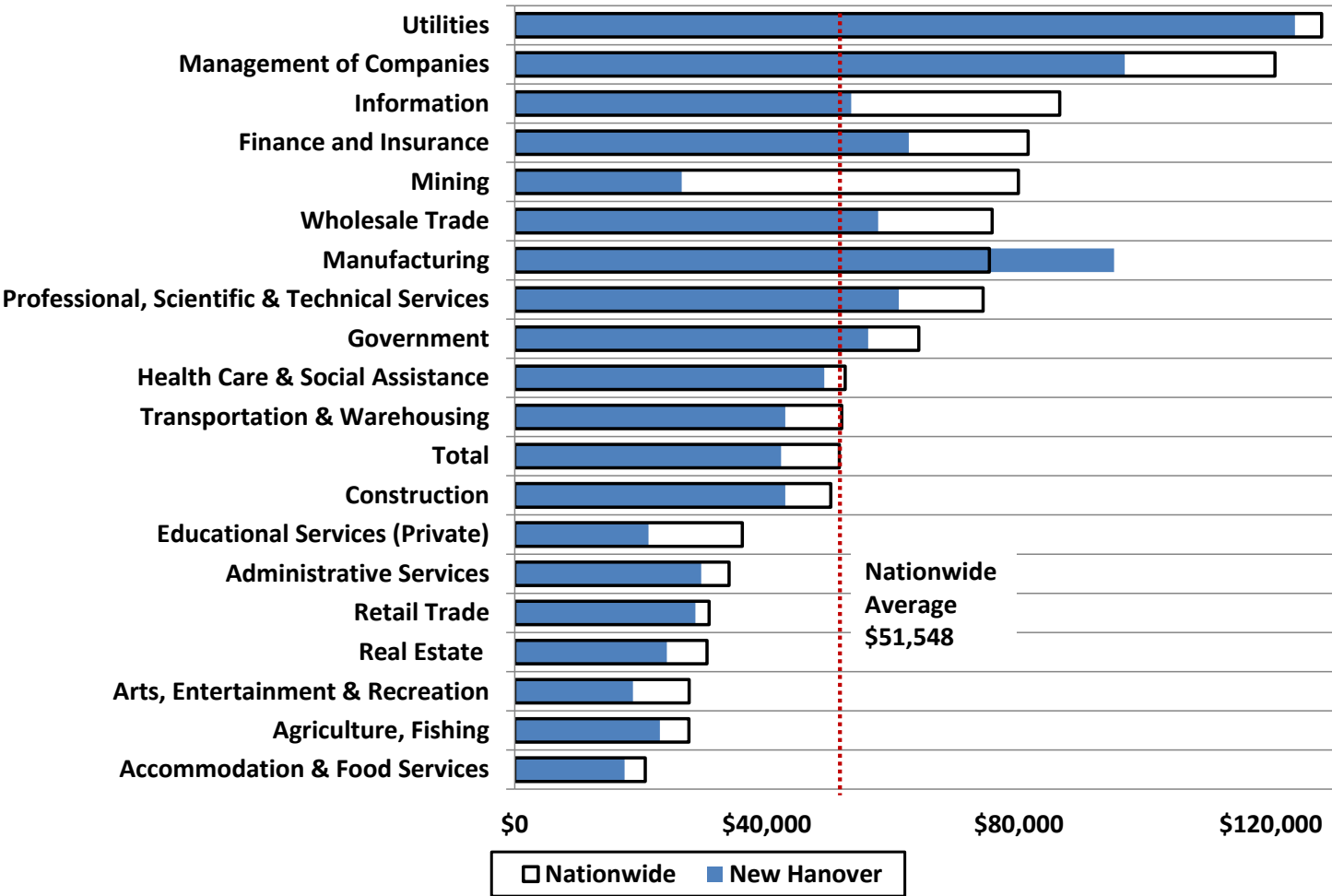


- Industry Sector Change
- Industry Earnings
- Occupational Change
- Occupational Earnings
- Cluster Specialization & Growth
- Cluster Competitiveness
- Occupational Specialization & Growth

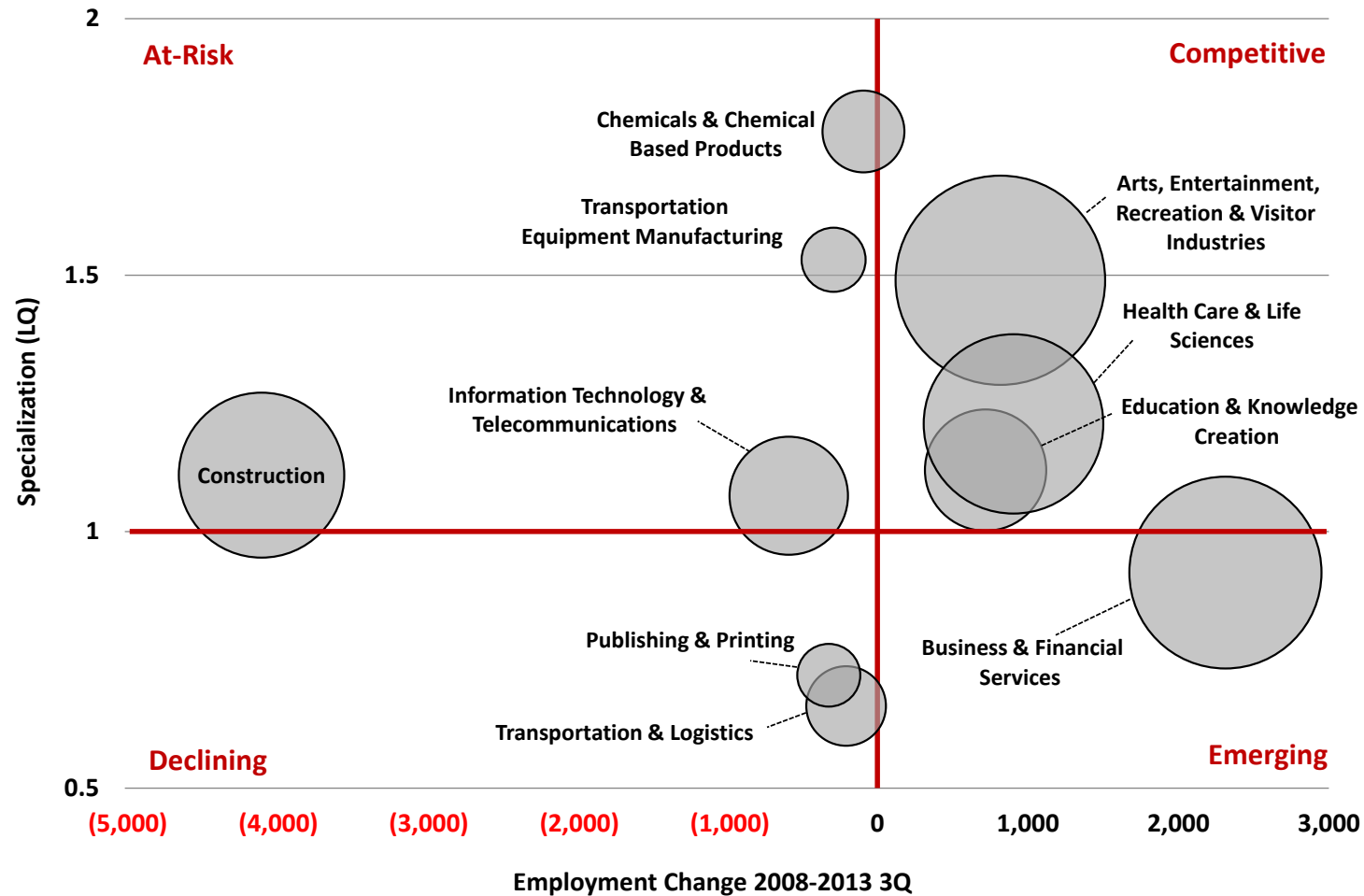
# Five-Year Employment Change by Major Industry



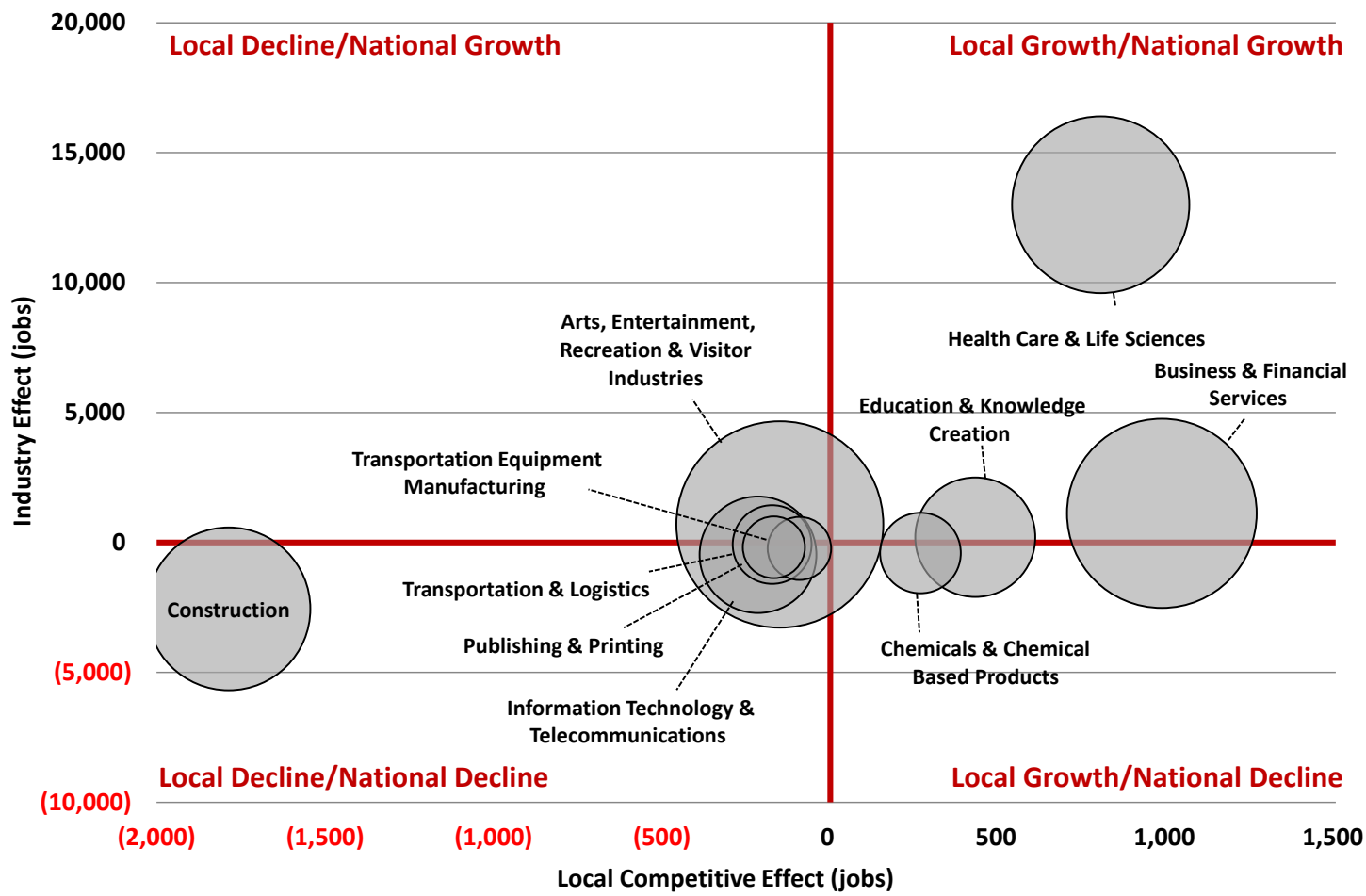
# Average Annual Industry Earnings Comparison



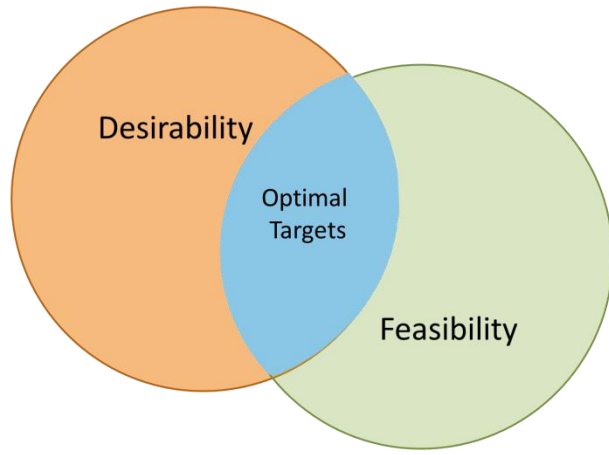
# Cluster Specialization & Growth



# Cluster Components of Growth



Source: EMSI, Garner Economics, 2008-2013 3Q



## Optimal Targets

- Based on the site-specific characteristics of New Hanover County
- **Four industry targets** chosen based on best match with unique competitive advantages in the area



# Optimal Targets for New Hanover County

|  |   |                                    |  |
|--|---|------------------------------------|--|
| <b>Life/Marine<br/>Sciences<br/>Research &amp;<br/>Development</b> | <b>High Value<br/>Office<br/>Operations</b> | <b>Precision<br/>Manufacturing</b> | <b>Aircraft<br/>Assembly,<br/>Modification &amp;<br/>Maintenance</b><br><i>(Aspirational target)</i> |
|--|---|------------------------------------|--|

# Life/Marine Sciences Research & Development

| Subsectors   | Some Rationales   |
|--|---|
| <ul style="list-style-type: none"> <li>❖ Research &amp; Development in the Physical, Engineering &amp; Life Sciences</li> <li>❖ Environmental Consulting Services</li> <li>❖ Medical &amp; Diagnostic Laboratories</li> <li>❖ Pharmaceutical Preparation Mfg.</li> <li>❖ Specialized Scientific &amp; Technical Consulting Services</li> <li>❖ Testing Laboratories</li> <li>❖ Biological Product Mfg</li> </ul> | <ul style="list-style-type: none"> <li>• Presence of AAIPharma Services Corp., PPD, BioDuro, and Chemtex. (P)</li> <li>• Presence of Marine Bio-Technologies Center of Innovation (MBCOI) and MARBIONC at UNCW. (P)</li> <li>• 538 annual post-secondary completions in critical fields from local institutions. (P)</li> <li>• High local specialization and strong growth in the <i>Healthcare &amp; Life Sciences cluster</i>. (P)</li> <li>• Strong local competitive advantage demonstrated in the <i>Healthcare &amp; Life Sciences cluster</i>. (P)</li> <li>• Availability of suitable office space and office sites. (P)</li> <li>• Average target subsector national earnings of \$96,396. (C)</li> </ul> |

# High Value Office Operations

| Subsectors  | Some Rationales   |
|---|---|
| <ul style="list-style-type: none"> <li>❖ Administrative Management &amp; General Management Consulting Services</li> <li>❖ Computer Systems Design Services</li> <li>❖ Custom Computer Programming Services</li> <li>❖ Financial Transactions Processing, Reserve &amp; Clearinghouse Activities</li> <li>❖ Payroll Services</li> <li>❖ Pension Funds</li> <li>❖ Inbound Call Centers &amp; Other Contact Centers</li> <li>❖ Trust, Fiduciary &amp; Custody Activities</li> </ul> | <ul style="list-style-type: none"> <li>• Strong recent growth in the <i>Business &amp; Financial Services</i> cluster. (P)</li> <li>• Among top recommended industry target in stakeholder focus groups. (C)</li> <li>• High broadband availability. (P)</li> <li>• High proportion of residents that have attained associate's, bachelor's or graduate degrees. (P)</li> <li>• Average target subsector 2012 national earnings of \$74,135. (C)</li> <li>• Average target subsector five-year forecasted growth of 17.6 percent. (C)</li> <li>• 847 annual post-secondary completions in critical fields from area institutions. (P)</li> <li>• Strong existing local pool of high-demand occupations. (P)</li> <li>• Strong quality of place assets. (P)</li> </ul> |

# Precision Manufacturing

| Subsectors  | Some Rationales   |
|---|---|
| <ul style="list-style-type: none"> <li>❖ Optical Instrument &amp; Lens Mfg.</li> <li>❖ Turbine &amp; Turbine Generator Set Units Mfg.</li> <li>❖ Speed Changer, Industrial High-Speed Drive &amp; Gear Mfg.</li> <li>❖ Instruments &amp; Related Products Mfg. for Measuring, Displaying &amp; Controlling Industrial Process Variables</li> <li>❖ Analytical Laboratory Instrument Mfg.</li> <li>❖ Specialized Measuring &amp; Controlling Device Mfg.</li> <li>❖ Medical Equipment &amp; Supplies Mfg.</li> </ul> | <ul style="list-style-type: none"> <li>• Presence of <i>GE Aviation</i> and <i>GE Hitachi Nuclear Energy</i>. (P)</li> <li>• High existing local industry specialization in <i>Aerospace Product &amp; Parts Mfg.</i> (P)</li> <li>• Among top recommended industry target in stakeholder focus groups. (C)</li> <li>• Availability of water and wastewater capacity. (P)</li> <li>• Well positioned to serve international markets. (P)</li> <li>• Low relative level of unionization. (P)</li> <li>• Availability of labor training incentives. (P)</li> <li>• Air connectivity: Wilmington International Airport (ILM). (P)</li> <li>• Average target subsector national earnings of \$91,973. (C)</li> <li>• Average target subsector five-year forecasted growth of 8.1 percent. (C)</li> <li>• 300 annual post-secondary completions in critical fields from local institutions. (P)</li> <li>• Strong existing local pool of high-demand occupations. (P)</li> </ul> |

# Aircraft Assembly, Modification & Maintenance

*aspirational target*

| Subsectors   | Some Rationales  |
|--|--|
| <ul style="list-style-type: none"><li>❖ Aircraft Assembly, Overhaul &amp; Conversion</li><li>❖ Aircraft Engine Rebuild &amp; Overhaul</li><li>❖ Aircraft Inspection Services</li></ul> | <ul style="list-style-type: none"><li>• Presence of <i>GE Aviation</i>. (P)</li><li>• High existing local industry specialization in Aerospace Product &amp; Parts Mfg. (P)</li><li>• Presence of Wilmington International Airport (ILM). (P)</li><li>• Presence of Port of Wilmington. (P)</li><li>• Average target subsector national earnings of \$96,697. (C)</li><li>• Average target subsector five-year forecasted growth of 5.5 percent. (C)</li><li>• 130 annual post-secondary completions in critical fields from local institutions . (P)</li><li>• Strong existing local pool of high-demand occupations. (P)</li><li>• Well positioned to serve international markets. (P)</li><li>• Aging industry workforce. (P)</li><li>• High proportion of residents that have attained associate’s, bachelor’s or graduate degrees. (P)</li><li>• Availability of labor training incentives. (P)</li></ul> |

Execute Effectively

Build a Better New Hanover

Tell the Story

## Where Do We Go From Here?

### Observations, Conclusions & Recommendations

- New Hanover County has challenges that need to be mitigated and assets upon which to build
- Recommendations are from a site-selector perspective to increase economic opportunities in New Hanover County

# Twenty-one recommendations built on three foundations:

1. Mitigate negative perceptions or challenges that deter increased investment
2. Create an environment where high quality companies and talent will want to locate
3. Assist the County in identifying and marketing to optimal targets to ensure more economic opportunities

*\*S denotes stakeholder desired action*

*\*T denotes transformational recommendation*

# Execute Effectively

## Strategy/Goal

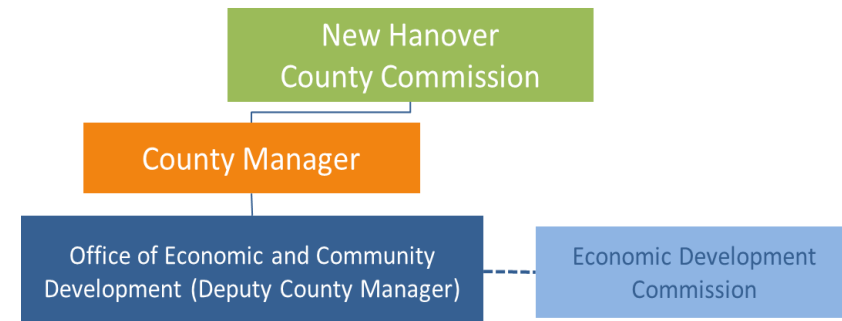
Build a focused economic development service delivery mechanism for existing and potential businesses in the County and collaborate with other economic development entities to work seamlessly with external clients.



# Execute Effectively

## Actions

1. Create a County Department of Economic and Community Development and hire a Director.
2. Create a three-county micro marketing alliance of New Hanover, Brunswick, and Pender Counties. (S)
3. Consolidate services and explore the feasibility of consolidated government in New Hanover County. (S)(T)
4. Advocate for and develop a realistic and sustainable incentive policy for New Hanover County (and the City).



# Execute Effectively

## Actions

5. Eliminate the Special Use Permit from the County's permitting process or Modify the SUP Table of Permitted Uses.
6. Recruit and help train business leaders to serve in elected office, and to serve on appointed boards and commissions. (S)(T)
7. Better Support Small and New Businesses:
  - a. Increase communications with small businesses
  - b. Identify existing resources that will help small and new business grow
8. Raise awareness of the economic development process (and returns) among all stakeholder groups.

# Build a Better New Hanover County

## Strategy/Goal

Strengthen the County's assets and transform key areas that support the County's desire to attract and grow more high-quality economic activities.

# Build a Better New Hanover County

## Actions

1. Make the case for sustainable funding sources to improve the County's economic development infrastructure and identify catalytic programs to use the monies effectively. (T)
2. Establish an Airframe and Power plant (A&P) certificate program at Cape Fear Community College. (S)
3. Develop hangar facilities at ILM to attract MROs and aircraft assembly operations. (S)
4. Advocate for the creation of a pharmacy school in the region.

# Build a Better New Hanover County

## Actions

5. Develop a real estate portfolio of additional sites for industrial, commercial, and office development. (S)(T)
6. “ReBuild” New Hanover. (S)(T)
7. Provide the public free high-speed Internet access throughout New Hanover County.
8. Advocate for the continuation of incentives for the film industry.

# Build a Better New Hanover County

## Actions

9. Facilitate regional efforts to grow the Talent Pipeline. (S)(T)
  - a. Support career academies or career pathways in middle and high school
  - b. Ensure each high school student has the ability and option to graduate from high school with an AA degree or 2 years of credit hours from a 4-year university
  - c. Support career awareness of cluster occupations through internships
  - d. Improve graduation rates by promoting entrepreneurship among the County's youth

## Tell the Story

### Strategy/Goal

Tell New Hanover County's economic development story more effectively to a more targeted audience of potential companies and investors.

# Tell the Story

## Actions

1. Support the optimal targets by establishing industry working groups for each.
2. Execute a process for lead generation.
3. Develop familiarization (FAM) events for consultants and companies.
4. Create a cadre of regional ambassadors to extend the region's brand.





# What's Next?

## New Hanover County's Leadership will need to:

- Facilitate and enable productive dialog to determine the next path for the County's economic development future
- Work proactively to grow the area's talent pipeline
- Advocate for a sustainable funding source to fund needed infrastructure/economic development projects
- Mitigate policies and regulations that deter further investment
- Brand and market the County and region to targeted business sectors



# Thank you!

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# Questions?

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